GiftWorks User Manual

GETTING STARTED

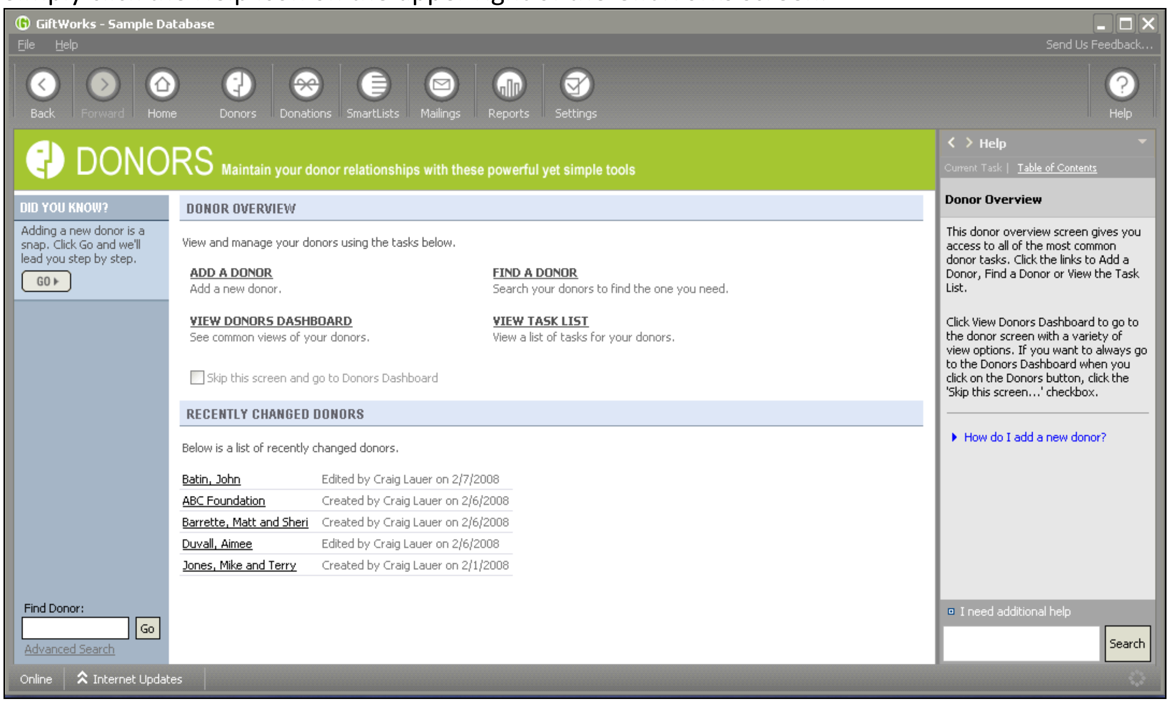
IN THIS SECTION

ABOUT THIS MANUAL

This Manual was created to give you all the information you need to use GiftWorks fundraising software as part of a complete and effective fundraising strategy—all in one convenient document.

Using the Built-in Help

GiftWorks includes easy-to-understand help on almost every screen of the software. It's context-sensitive, offering relevant guidance about the features of whatever screen you're interacting with. Simply click the Help icon on the upper right of the GiftWorks screen.



Getting Around GiftWorks

Using GiftWorks is easy. Sections are on the top, things you can do that are related to your current action are on the left, your work is in the middle, and help is available on the right and follows you where you go.

SYSTEM REQUIREMENTS

Hardware:
1-GHz Pentium or greater
1GB, 2GB recommended
200MB available hard-disk space

Software:
Windows 2000 Professional (with latest service pack); Windows XP Home, Professional, Professional x64 (all with with latest service pack) Windows Vista Home, Business, Ultimate, 64-bit; Windows 7 Home Premium, Professional, Ultimate, 64-bit

Internet Explorer 32-bit 7/8/9

GiftWorks integrates with the QuickBooks Pro and Premier Editions (including the Nonprofit Edition), for the years supported by Intuit, including the US, UK and Canada versions.
Note: Please be aware that if you are using Windows Vista or Windows 7, you may need to disable user account control for the GiftWorks interface with QuickBooks to work.
GiftWorks does not integrate with the QuickBooks Online or QuickBooks Simple Start Editions.

GiftWorks can optionally use Microsoft Outlook to send outgoing email. GiftWorks is not compatible with Microsoft Outlook 64-bit. GiftWorks is compatible with the 32-bit version of Microsoft Outlook. Starting with GiftWorks 2012, users can also send email using their outgoing email server (SMTP).

Important Information for Trial Users

- The GiftWorks trial is intended for evaluation purposes only.
- The GiftWorks trial expires 30 days after installation and you will need to purchase a GiftWorks license to continue using GiftWorks. Files created with the trial software will no longer be accessible after the trial expires.
- **Emails to GiftWorks Customer Care are included with this trial.** There is no paid technical support included with this trial.
- You must accept the GiftWorks License Agreement during installation before you can use this product. If you do not accept the terms of the License Agreement, do not install or use the product.

INSTALLING GIFTWORKS

Installing from a CD

1. Insert disk into your CD-ROM drive. Installation will automatically begin. If it does not, double-click **My Computer**, and then double-click your CD-ROM drive icon. Choose **SETUP.EXE**.

2. From the initial setup screen, click **Next**. You can select **Back** any time during installation if you want to change a previous selection.

3. Read the GiftWorks License Agreement. If you accept the terms of the License Agreement, select the **I accept** button and click **Next**. If you cannot accept the terms of the License Agreement, select **Cancel** and do not install or use the product.

4. Enter your name and your organization's name in the spaces indicated. If you want anyone using this computer to be able to use GiftWorks, select the **Anyone** button. You will be able to add additional user names after installation. If you are the only person who should be able to use GiftWorks, select the **Only for me** button. Click **Next** after making your selection.

5. GiftWorks will install into your Program Files folder by default. Click **Next** to accept this default setup. If you want to install into a custom folder instead, select **Change** and browse to the folder of your choice or create a new folder. Click **OK** once you have chosen a folder, then click **Next**. If you are creating a new folder, GiftWorks will ask you for confirmation. Click **OK** to confirm this.

6. GiftWorks is now ready for installation. Click **Install**. Installation may take several minutes.

7. When the installation wizard is completed, you may check the **Launch Mission Research GiftWorks**

box and click **Finish** to launch GiftWorks. If you want to use GiftWorks later, click **Finish**.

Installing from a Download

1. Download the GiftWorks installation file from http://www.giftworksconnect.com/giftworks/downloads.

2. When given the option, choose to save the downloadable file, and save it to an easy-to-remember location such as your desktop.

3. When the download is complete, double-click downloaded file to start the installation.

4. From the initial setup screen, click **Next**. You can select **Back** any time during installation if you want to change a previous selection.

5. Read the GiftWorks License Agreement. If you accept the terms of the License Agreement, select the **I accept** button and click **Next**. If you cannot accept the terms of the License Agreement, select **Cancel** and do not install or use the product.

6. Enter your name and your organization's name in the spaces indicated. If you want anyone using this computer to be able to use GiftWorks, select the **Anyone** button. You will be able to add additional user names after installation. If you are the only person who should be able to use GiftWorks, select the **Only for me** button. Click **Next** after making your selection.

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8. GiftWorks is now ready for installation. Click **Install**. Installation may take several minutes.

9. When the installation wizard is completed, you may check the **Launch Mission Research GiftWorks** box and click **Finish** to launch Mission Research GiftWorks. If you want to use GiftWorks later, click **Finish**.

SETTING UP GIFTWORKS

1. To launch GiftWorks, go to the Windows task bar and click **Start**, click **Programs**, click **Mission Research,** and then click **GiftWorks**, or double-click on the GiftWorks "G" icon on your Desktop.

2. If you've already purchased GiftWorks, enter your Software Key in the box indicated and click **Go.** To buy GiftWorks, click on **Buy GiftWorks Now** and submit payment through our secure Web site. To start a no-risk trial, click on **Try GiftWorks Free.**

3. Next, you must register your copy of GiftWorks. Enter the requested information and click **Next**.

4. The following page will confirm your Trial or Purchase. Click **Next.**

5. At the welcome screen, click **Start**.

6. If you installed GiftWorks from a CD, we recommend that you check for any software updates. Click **Check for Updates** to do this now.

7. GiftWorks is set to check for software updates automatically. Click **Next** to confirm this setting and have GiftWorks check for updates automatically. If you want to turn this feature off, deselect the **Have GiftWorks check for updates** box before clicking **Next**.

8. Enter your name in space provided and click **Next**.

9. If you want to try out the features of GiftWorks without setting up your own database, you can select the **Use the sample database** button before clicking Next. GiftWorks assumes that you want to create a new database. Click **Next** to set up your new database. If you have an existing GiftWorks database to use, click **Select an existing database** before clicking **Next**.

    - If you are creating a new database, enter a name for this database in the space provided. GiftWorks will automatically save your database in a preselected GiftWorks folder. Click **Next** to accept this selection. If you want to save your database in a custom location, click the linked filename below and choose the folder that you want to use. Click **OK** once you have highlighted your selection, then click **Next**.
    - If you are selecting an existing database, click **Browse** and choose the GiftWorks database (.GDS) file you want to use. Click **Open** once you have highlighted your selection. Click **Next** to launch your database.

10. If you have created a new database, GiftWorks now takes you through the setup wizard. It gives you guidance for doing some preliminary setup for your database and takes you through the optional process of importing donor and donation information from another application.

11. You have completed setup! Click **Sign In** to open GiftWorks. If you want to change any setup selections before signing in, click the option and follow the setup instructions for that item.

Helpful Tip

GiftWorks Standard and Premium are initially set to Basic Security. The options available in Basic Security are the same whether you are working in GiftWorks Standard or Premium. In the Basic Security level you can:

- Set an Administrative Password to protect the Settings section of GiftWorks.
  The Settings section contains all administrative settings and include your custom fields and values, accounting settings, and database backup settings.
- Any user can sign in and create a password to start working with GiftWorks. If you set an Administrative password, other users will not be able to access any settings other than to change the username.

Gift Works PREMIUM USERS ONLY

Before you change security levels, refer to the ***GiftWorks Security Guide*** for more information on security levels and options available in GiftWorks Premium.

IF YOU ARE NEW TO GIFTWORKS

GiftWorks helps you support your organization's mission more efficiently and effectively by tracking donors and donor relationships, donations and pledges, mailings, lists, and campaigns—all in one place.

Maybe you've been working with a different database software package, or you currently use only a spreadsheet to track your donor information. GiftWorks will be an immediate improvement. Before importing or manually entering data into GiftWorks, now is the time to ask yourself these questions:

- What have you been doing that's working well?
- What areas need to be improved?
- Who is responsible for tracking your donor information?
- Who ultimately utilizes the information and what are their needs?

GiftWorks lets you store all information in one place for a comprehensive picture of a donor's connection with and participation in your organization. But the information won't benefit you as much as possible if it isn't easily accessible or properly utilized. A solid database takes planning and organized implementation to ensure reliable and accessible information, to support your efforts, and to increase your revenue.

CREATING STANDARDS FOR YOUR ORGANIZATION

When storing the following information, be sure to create standard practices for your organization for storing the following information. In the long run, you'll be glad you did.

Names

- Will you use formal or informal name versions for mailing, or both? If you use formal, what will be your standard prefixes? Will you abbreviate (Rev. or Reverend)? Use the customizable prefix field (Settings/Customize/Change Field Values) to define your standards for data entry.
- Will your formal names include middle initials and suffixes where applicable? Take care to edit data being imported, and make this standard known to all staff or volunteers who enter donor information into GiftWorks for your organization.

Helpful Tip

If you typically use formal addressee or salutation information, you can also enter or import an informal version, providing flexibility in the future should your needs change.

Salutations

- If you use informal salutations, will you always want the full name or will you want nicknames where applicable (William or Bill)?

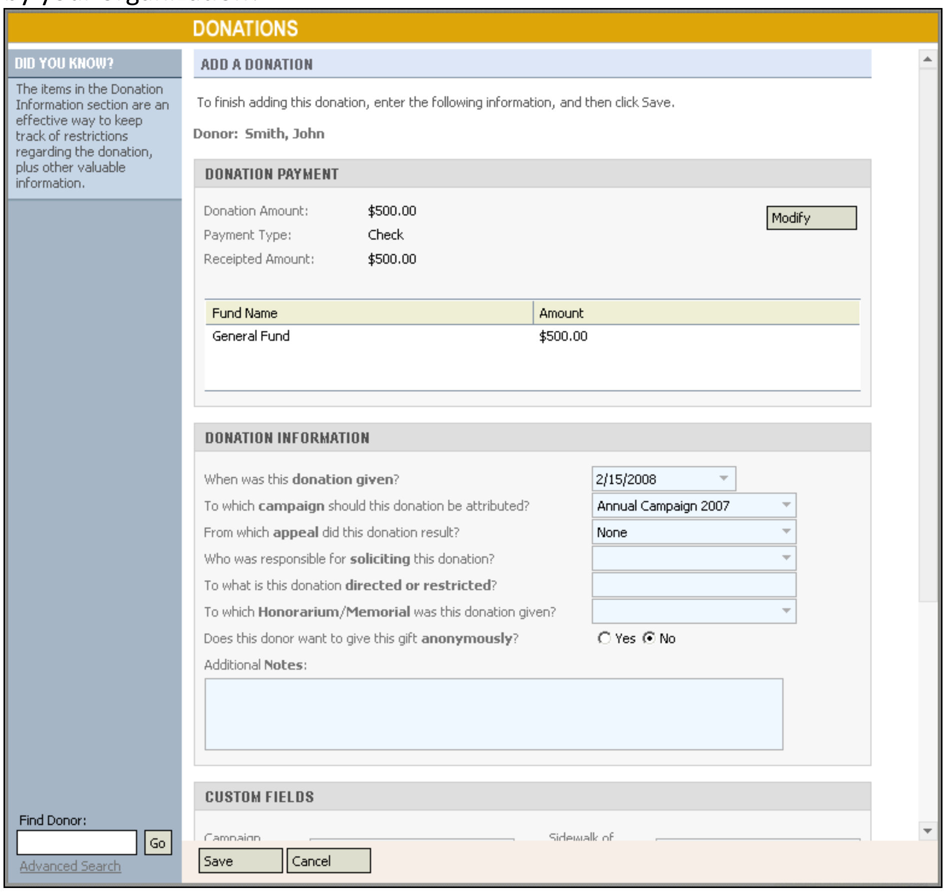
Addresses

Do you use postal abbreviations or prefer to write out entire words in your addresses? Will you use formal, informal, or both? Be consistent.

- Edit your data for consistency in a spreadsheet prior to import.
- Make your standard known to all data entry staff or volunteers.

Gifts and Pledges

Review the donation entry screen in GiftWorks. What are the mandatory fields to fill for gifts received by your organization?



Does your current gift data have the basic information (date, amount, campaign, fund, appeal)?

Date—how do you track the actual date of the gift (not the check date)?

- For donations, the Payment Date field can be edited and should be used consistently within your organization.
  - The field defaults to the date of entry, but this does not reflect the donor's gift date.
  - You can enter the date you receive the gift, although the IRS considers the postmark date as the donor's legal date of gift.
  - Be consistent for accuracy in reporting.
- For Pledges, there is a Created Date (not important to the IRS), and then the pledge payments (donations) have Payment Dates as noted above.

ANALYZING YOUR DATA

To maximize your efforts, analyze your current data and development process and consider how to best use GiftWorks to track the following information:

Solicitors

Do your board members cultivate and solicit major donors for annual gifts? The Assigned To field stores the primary solicitor for each donor. The Solicitor field stores solicitation information for each donation or pledge.

- If you have this information in your current data and plan to import it, make sure the names are consistently entered.
- If haven't been tracking the information but would like to begin doing so, you can add it to your data prior to import, or manually add it while entering records.

Will you be conducting a capital campaign?

- You may use different board or committee members to solicit a capital gift than the solicitor assigned for annual fund cultivation. Consider using a donor custom field to track capital campaign solicitors separately from annual fund solicitors.

Capital Campaign

Do you need to track the progress of soliciting major donors during a capital campaign?

- Consider using Donor Custom Fields to track general information (solicitors 1 & 2, target amount, status, etc.) for inclusion in donor-based reports for your meetings.
- Existing data can be imported or manually entered into the custom fields. Again be sure that data being imported is consistently entered. If there are variations in your existing data, each unique value will be added to GiftWorks.

Membership

Do you have basic membership—one to three levels based on the amount of the gift, for example?

- GiftWorks provides two date fields (member since, renewal date) to track when a donor first becomes a member and when their membership is next up for renewal.
    - Consider using Donor or Donation Custom Fields to track the current level of membership.

Event Management—Such as a Golf Tournament

Do you have a golf tournament or other similar event?

- Consider utilizing Group Codes to segment golf players (Golf Player 2008).
- Consider a donor custom field to track the player's team name and handicap (John's Team – 18) and include it in a list of players for game day.
- Consider using donation Appeal codes to track player fees (paid by each player, by one player, or by an organization) and sponsorships.
- Consider using a Donation Custom Field to track the level of sponsorship tied to the sponsorship gift.

Helpful Tip

Consider carefully how many of the limited number of custom fields to dedicate to each process.

Tasks

Does your Executive Director and/or Development Director track the history of communications with major donors?

- GiftWorks includes a Tasks feature.
    - Define task categories (Settings/Customize/Change GiftWorks Fields / Task Categories)
    - Create tasks using a category, text description, due date and time.
    - Tasks are stored on the Notes Tasks & Files tab of a donor profile.
    - Upcoming tasks show on the GiftWorks Start Page (click the Home button at the top of the GiftWorks window).
    - View and customize task lists and mark tasks as completed.
- It is important that staff utilizing this feature have regular access to GiftWorks and actively check on the status of tasks.

DONORS

IN THIS SECTION

DONORS OVERVIEW

Donors are the lifeblood of your organization. GiftWorks helps you develop stronger relationships with your donors by giving you the tools to track donors, their donations, and all of your organization's interactions with them. Everyone you enter into GiftWorks—individuals, households, organizations, or others—is called a donor, whether they've donated to your organization yet or not. Donors can also be designated as an affiliate.

Donors: Most of the individuals, couples, families, households, and organizations in your database will be entered as donors. In most cases, you can enter all information about a household or organization into one donor record. You can also add a household or organization profile to a donor record, providing visual cues that they are a household or organization, as well as some profile-specific features like household or work relationship tracking. The type of profile can also be used to choose the information you use for SmartLists, mailings, and some reports.

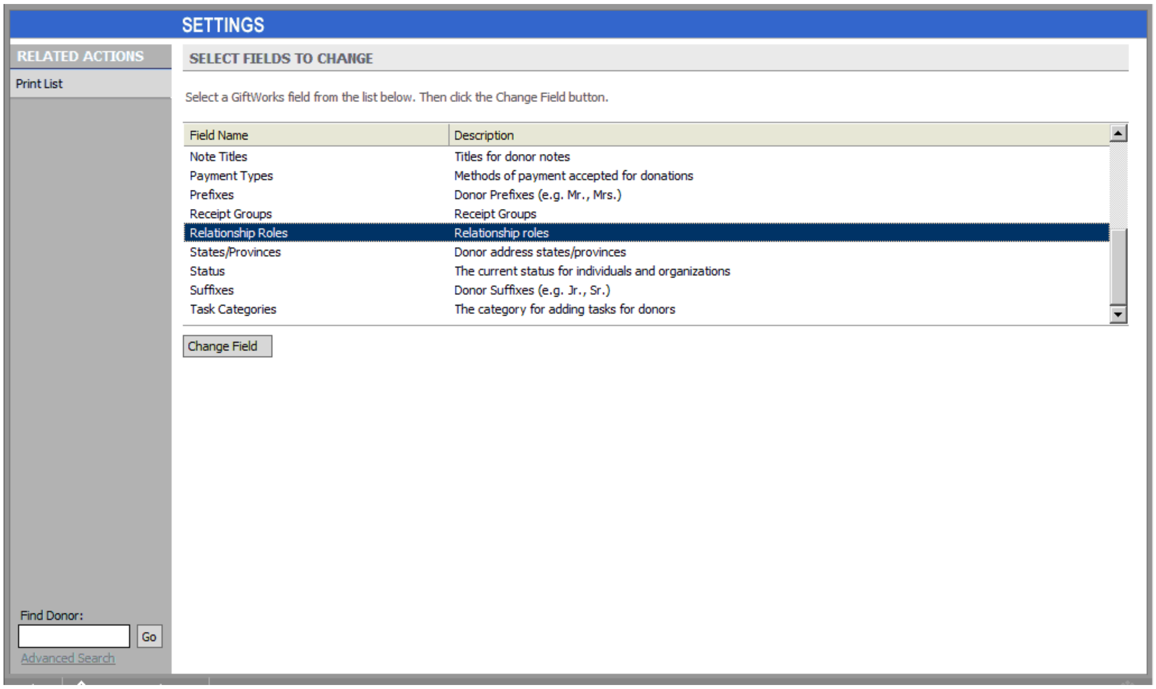
Affiliate Donors: People or organizations you want to have information about in your database, but who you don't typically want to solicit, and from whom you do not expect to receive donations, can be marked as affiliate donors.

Affiliate donor records contain the same information as regular donor records, but by default, they are omitted from SmartLists. You can add them into SmartLists if you want to mail to them, but they will not receive your mailings unless you explicitly choose to send to them.

Also, you cannot add donations to affiliate donors. If you want to add a donation to an affiliate donor, you must first remove the affiliate donor designation. Affiliate donors can have any of the profile types. For more information, see Understanding Profiles.

UNDERSTANDING RELATIONSHIPS

There are three types of relationships in GiftWorks: relationship, family relationship, and work relationship. In the Settings section of GiftWorks, you can customize the list of roles donors can play in each relationship type.



Relationship: A relationship can include friends, golf buddies, and many other relationship types. You can use these to track how your donors are interconnected. Knowing that John is a college friend of Carol (a board member) might change how you solicit him. Relationships can be used to define SmartLists and in some reports, giving you a powerful way to track and take advantage of your donors' social networks.

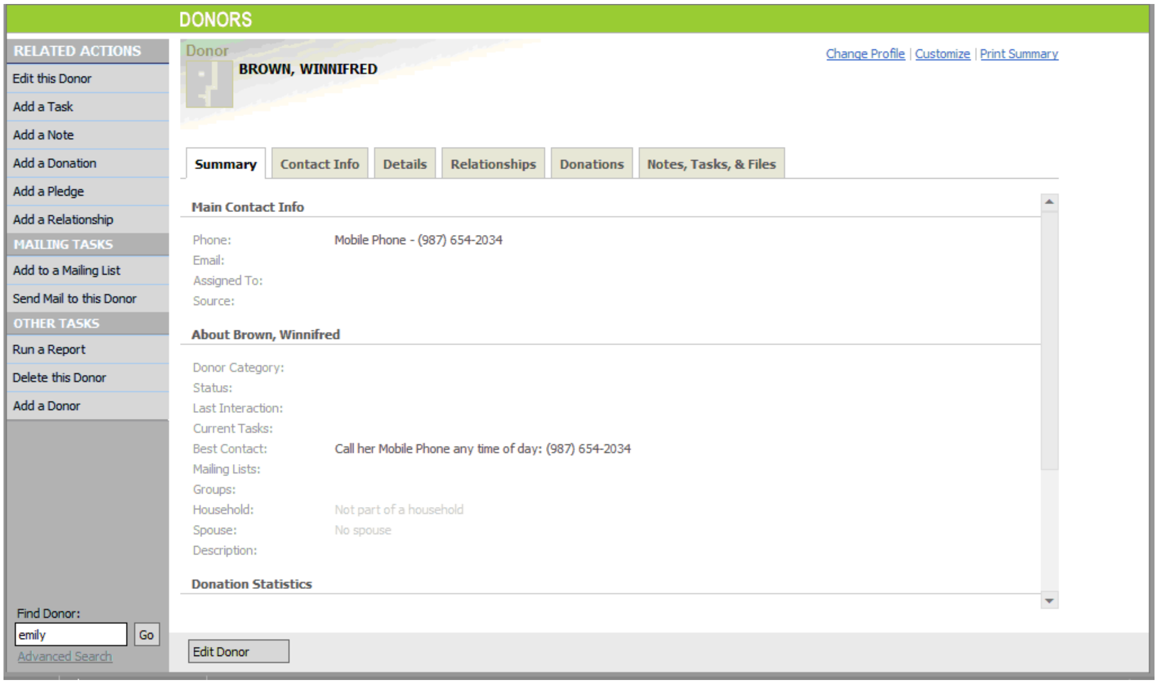
Family relationships: This relationship type can be used to define relationships among family members in your database, and also within households. See Donor with Household Profile for more information.

Work relationships: This type can help you track which donors work for which organizations or companies. This can be especially helpful if you want to solicit all employees of a particular corporation for an upcoming special event.

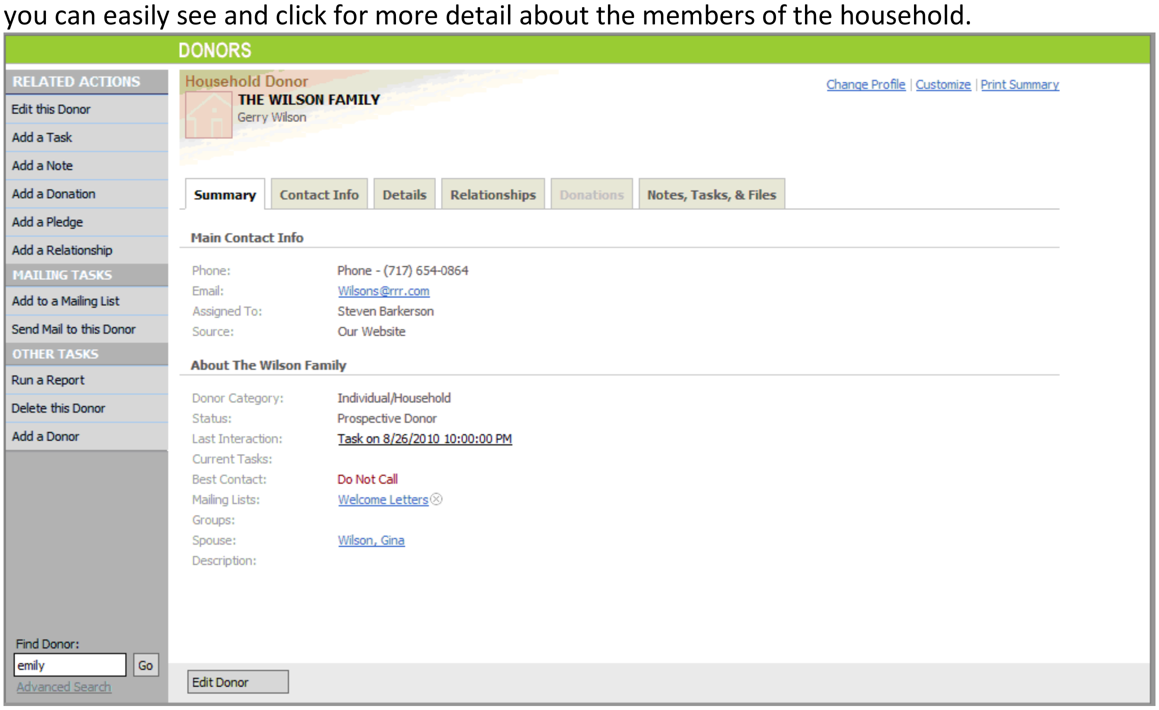
UNDERSTANDING PROFILES

Donors in GiftWorks can have a profile applied to their record. By default, a donor will have no profile, which is probably suitable for many of the donors in your database. The other profile options are household and organization.

You can apply or change a donor's profile by clicking the **Change Profile** link at the top right of the main work area when viewing or editing a donor. The first step of the **Add a Donor** process also lets you specify a profile.



For a donor with a household profile, you can **Add a Household Member** from the relationships tab. This creates an affiliate donor with a relationship to the household. It also allows you to track information about household members without needing to create completely separate donor records for them. The primary record for that household will be the main household donor record. When viewing that record, you can easily see and click for more detail about the members of the household.



Choosing a household or organization profile for a donor record changes the color of the header that appears in the top left of the view donor screen. The type of profile is also indicated in the same area.

UNDERSTANDING DONOR NAME FIELDS

Every donor in GiftWorks has the same available name fields:

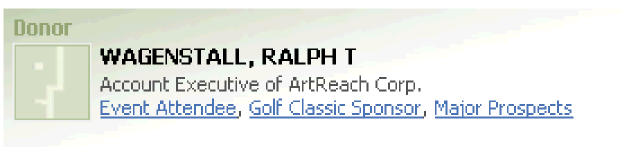
- Display name
- Name (prefix, first, middle, last, suffix, and nickname)
- Organization

The display name represents the donor throughout GiftWorks, including in SmartLists, when viewing a donor record, and in other places. Be sure to choose a default format for this field so your donors are consistently entered, and so you can find them where you expect to (in a sorted list, for instance).

“Lastname, firstname” is a good standard for individuals. “Lastname, firstname and firstname” is good for couples or households. For organization, use the actual organization name.

Depending on the profile you choose when adding a donor, you are prompted for the donor name, household name, or organization name.

Donor with No Profile



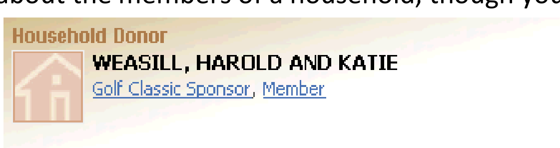
A donor with no profile can be anything: an individual, an organization, or a household. You can track information about organizations or households without having a profile applied to the donor record.

When entering the name for a donor with no profile, you might enter “John Q. Smith,” “John and Mary Smith,” “The Smith Household,” or “XYZ Corporation.”

As you continue through the process of adding the donor, GiftWorks will make a best guess as to how the pieces of the name you enter should be divided between the name fields. You can edit the values that GiftWorks puts in the fields.

Donor with Household Profile

A donor with a household profile will typically be a household, generally defined as a couple or family that gives to your organization as a unit. In most cases, you will not need to track specific information about the members of a household, though you certainly have the ability to do so in GiftWorks.



An example of a household might be “John and Mary Smith,” who support your annual campaign each year and want to be recognized in your newsletter as John and Mary Smith. You will almost always want to solicit them or send them other communications as a unit. They are effectively one donor.

For cases where you want or need to track household member information separately (if John or Mary is a board member, for example), but where you also receive gifts from the household, you can add an additional household member record to track that individual.

If the household member doesn't give money separately from the household, that member's record can be an affiliate donor. If they do give money separately, you can make them a donor. If you want to keep track of children's names, you can add them as household members and leave them as affiliate donors.

Donor with Organization Profile

Typically, you will enter organizations (companies, agencies, foundations, etc.) into your database as a donor with an organization profile.

You can link employees of a company with their company record. You can add your contacts at that organization as affiliate donors related to the organization. You can link board members of a foundation with the foundation's record. There is a great deal of flexibility.

TRACKING ADDITIONAL DONOR INFORMATION

In addition to the donor's name, GiftWorks lets you track a wide variety of information about each donor. The fields you can track for each donor are explained below.

Formal and Informal Salutation

The salutation fields are used to store information you would typically like to see after the "Dear" in a letter. You can store both formal and informal salutation values for each donor, which gives you flexibility for different types of communications.

An example of salutations might be "Mr. Smith" for formal and "John" for informal for the donor John Smith.

Formal and Informal Addressee

The addressee fields are used to store information you would typically like to see at the top of a mailing address (above the address itself). The addressee fields can have up to two lines, so you can put both a contact name and an organization name, for example.

The formal and informal addressee options give you flexibility for addressing letters for different purposes.

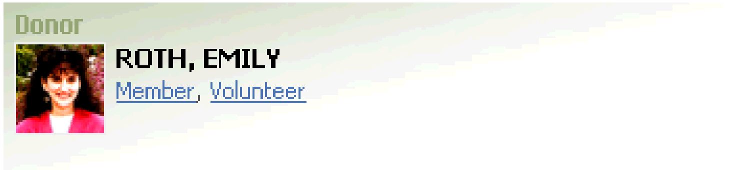
Donor Website

You can enter a website URL for your donor.

For example:
http://www.missionresearch.com

Donor Picture

You can select a picture to be displayed with your donor's record.



It could be a picture of the donor or a logo for an organization. The picture can, optionally, be displayed when you are viewing the donor's record and can be included in some reports.

Multiple Addresses
For each donor, you can enter any number of addresses.

> **STANDARD**
> You must designate one address as the donor mailing address, which will be used as the current mailing address for mailings sent from GiftWorks.
>
> **PREMIUM**
> You can enter multiple addresses for each donor and include a Seasonal Address. A Seasonal Address is a mailing address for a donor that has a specified active time period. See ***Edit a Donor*** for more information.
>
> In addition to the Primary Mailing address, both Standard and Premium can have a 2nd Address, a 3rd Address and Informational Addresses.

Multiple Phone Numbers
For each donor, you can enter any number of phone numbers. Whichever one you designate as the primary phone number will be available for listing in SmartLists and reports. You can also choose a 2nd and 3rd phone number to appear in SmartLists and reports.

Multiple Email Addresses
For each donor, you can enter any number of email addresses. Whichever one you designate as the primary is the one to which emails from GiftWorks will be sent. You can also choose a 2nd and 3rd email address number to appear in SmartLists and reports.

Contact Preferences
GiftWorks tracks a number of contact preferences for each donor. For email, phone, physical mail and solicitation you can choose whether it is okay to contact the donor via that method, whether they prefer not to be emailed, called,mailed or solicited, , or if they have no preference.

You can also indicate whether the donor wishes their contact information to be private, and you can indicate the donor's preferred time of day and method of contact.

Employment Details
GiftWorks lets you track the following information regarding a donor's employment:

- Job Title
- Profession
- Manager
- Contact Type

- Department
- Assistant

Development Details
For each donor, you can track a variety of information relating to your development and cultivation efforts. These include:

- Category
- Status
- Assigned To
- Source
- Member Since
- Renewal Date
- Accepts Match
- Match Info
- Issue Receipts
- Receipt Group
- Donor Groups

Category
Donor categories give you a way to further classify your donors. For example, you may want to divide your organizations into corporations, foundations, government agencies, and other categories. You can then use this information to create SmartLists of, for instance, all of the foundations in your database.

Status
Use the donor status field to record and track the donor's current status with regard to your organization. Sample values include active, inactive, and deceased.

Assigned To
The Assigned To field is included in each donor record, and allows you to designate a person the donor is assigned to. This may be an employee or board member, for example. The Assigned To designation might be used for the person primarily responsible for contacting or soliciting a donor.

Source
Use the Source field to to track how your donor was obtained. Examples of this could be a specific mailing or an Event or from your website.

Member Since
Use the field to track how long your donors have been Members

Renewal Date
Use this field to track when your donors Membership expires.

Accepts Match
Use this field to track if your donor accepts matched gifts.

Match Info

Use this field to enter any notes about the Match

Issue Receipts
Use this field to control whether or not the donor should be issued Receipts for their donations.

Receipt Group
Use this field to control what Receipt Group the donations will be added to for Receipt mailings.

Donor Groups
These fields appear in each donor record, but they differ from other donor fields in that you can select any number of groups for each donor.

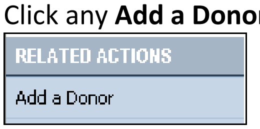
Each donor can be in as many or as few groups as you need. This gives you an easy way to designate groups of donors like board members, golf tournament sponsors, or members.

Custom Fields
Each GiftWorks donor record includes over 40 fields for recording information about that donor, but organizations often want to track other information about their donors. GiftWorks includes the ability to add custom fields to donor records.

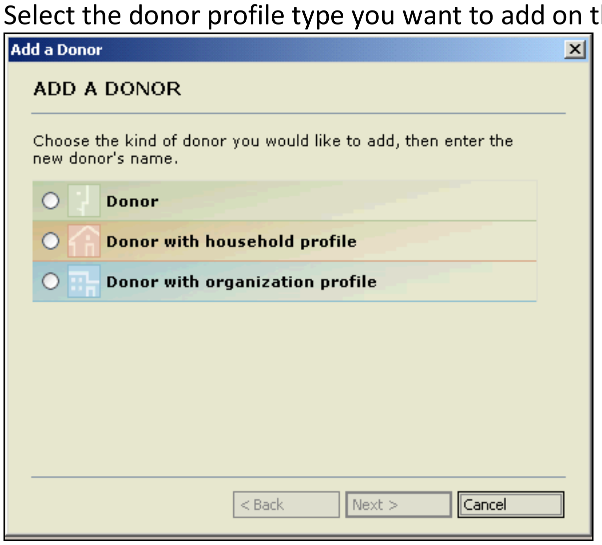
ADDING AND EDITING A DONOR

You can add new individuals, households, or organizations to your GiftWorks database. Organizations can include companies, nonprofits, corporations, and foundations.

Click any **Add a Donor** link (they appear throughout GiftWorks) to begin.

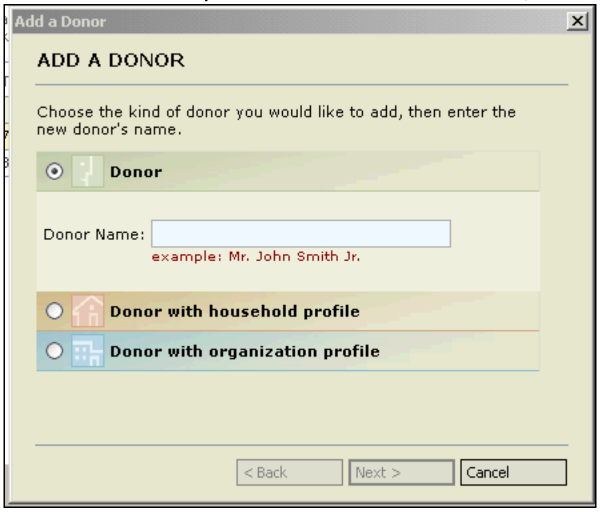


Select the donor profile type you want to add on the Add a Donor screen and click **Next** to continue.



Donor with No Profile
If you choose to add a donor with no profile, you will be prompted for the donor’s name.

A donor with no profile can be an individual, an organization, or a household.

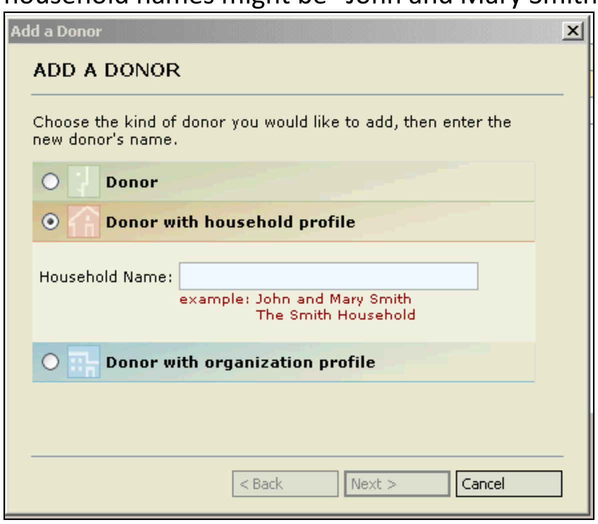


You can track information about organizations or households without having a profile applied to the donor record. When entering the name for a donor with no profile, you might enter "John Q. Smith," "John and Mary Smith," "The Smith Household," or "XYZ Corporation."

As you continue through the process of adding the donor, GiftWorks makes a best guess as to how the pieces of the name you entered should be divided between all donor name fields. You can edit the values that GiftWorks puts in the fields.

Donor with Household Profile

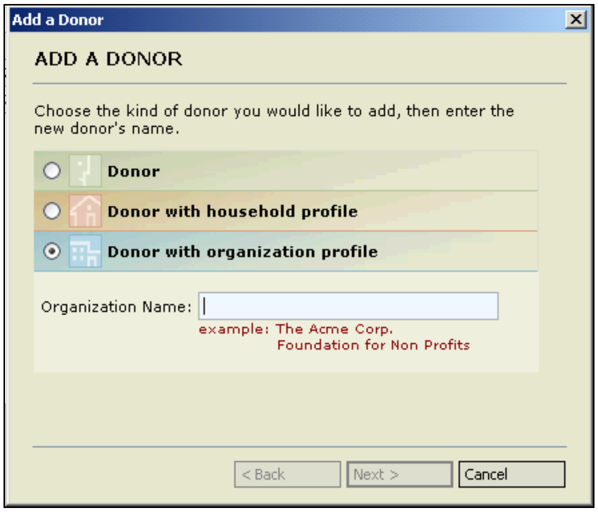
If you add a donor with a household profile, you will be prompted for the household name. Examples of household names might be "John and Mary Smith" or "The Smith Household."



A GiftWorks household can be generally defined as a couple or family that gives to your organization as a unit. Typically, you will not need to track specific information about the members of a household, though you have the ability to do so in GiftWorks.

Donor with Organization Profile

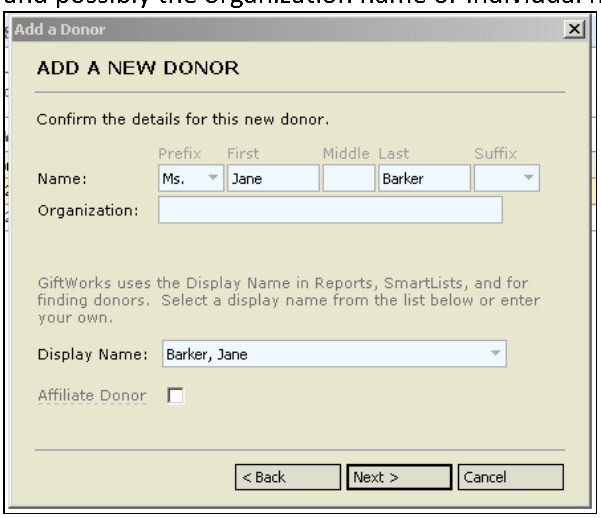
If you add a donor with an organization profile, you will be prompted for the organization name.



When you click **Next** on the first Add a Donor screen, you will be taken to a second screen to confirm the details for the newly added donor.

Confirming Donor Details

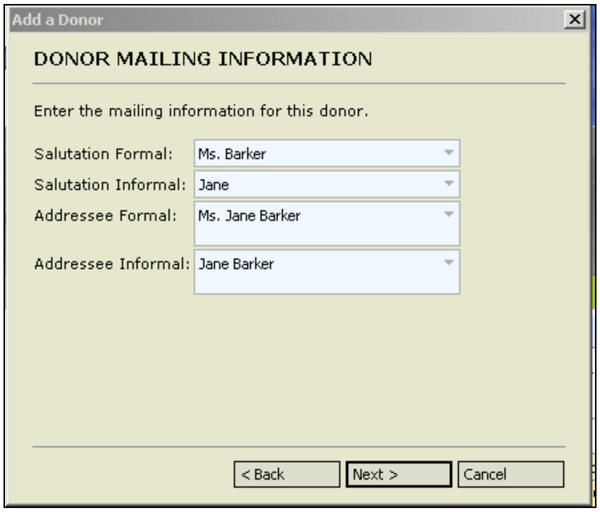
On the second step of the Add a Donor process, confirm the name you've entered for the donor you are adding. This will include the display name, whether you want the new donor to be an affiliate donor, and possibly the organization name or individual name fields (such as first, middle, and last).



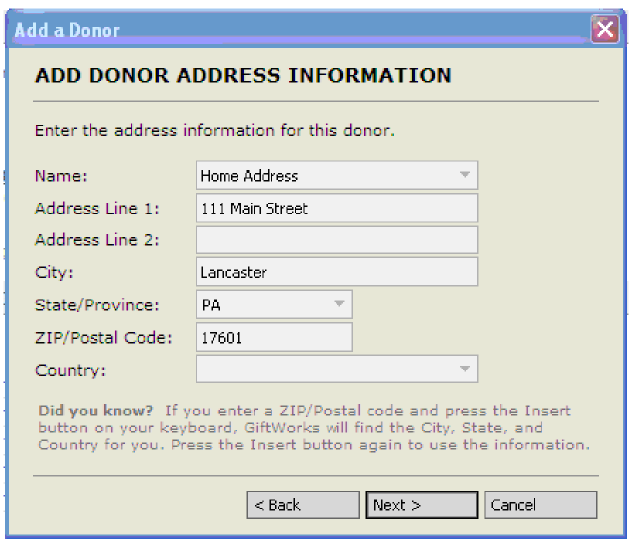
Verify that the values displayed are what you want and click **Next**.

Entering Donor Mailing Information

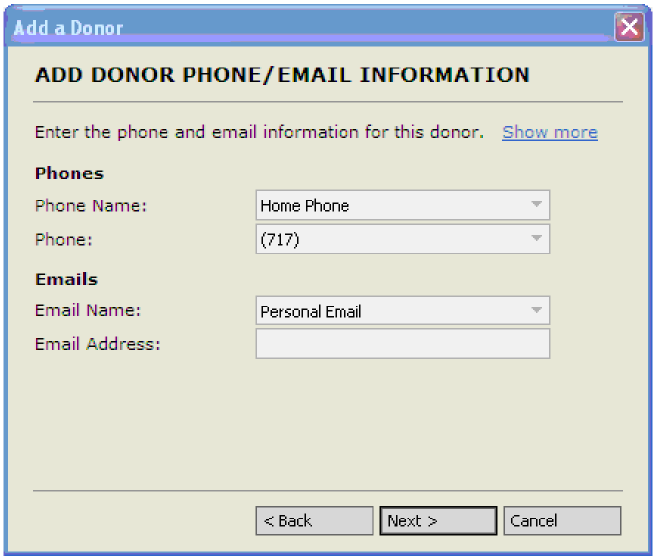
On the third step of the Add a Donor process, enter and/or verify the values for the salutation and addressee fields for the donor you are adding.



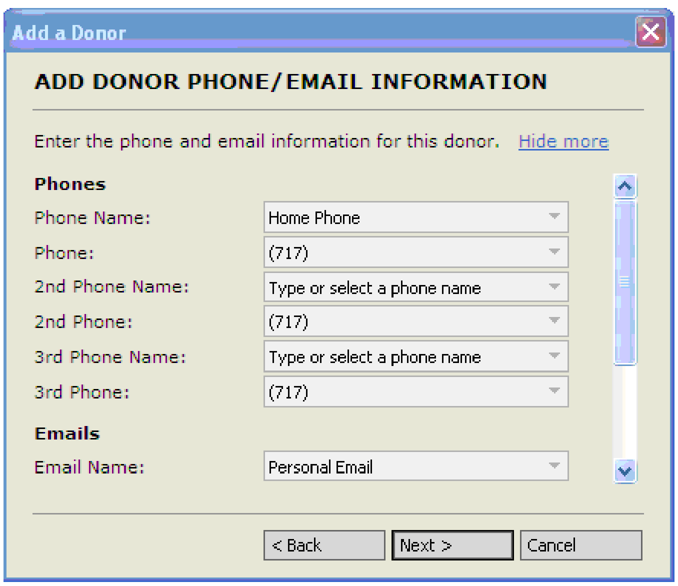
Entering Donor Address Information
On the fourth step of the Add a Donor process, enter the primary mailing address information for your donor. You can always add, remove, or edit this information later.
Zip Code Lookup: For United States users, GiftWorks will provide the ability to fill in the city and state based on the zip code when adding or editing an address



Entering Donor Phone/Email Information
On the fifth step of the Add a Donor process, enter the primary phone and email information for your donor. You can always add, remove, or edit this information later.



Clicking on the Show more link will allow you to enter in 2nd and 3rd phone and email information.



Selecting Donor Group

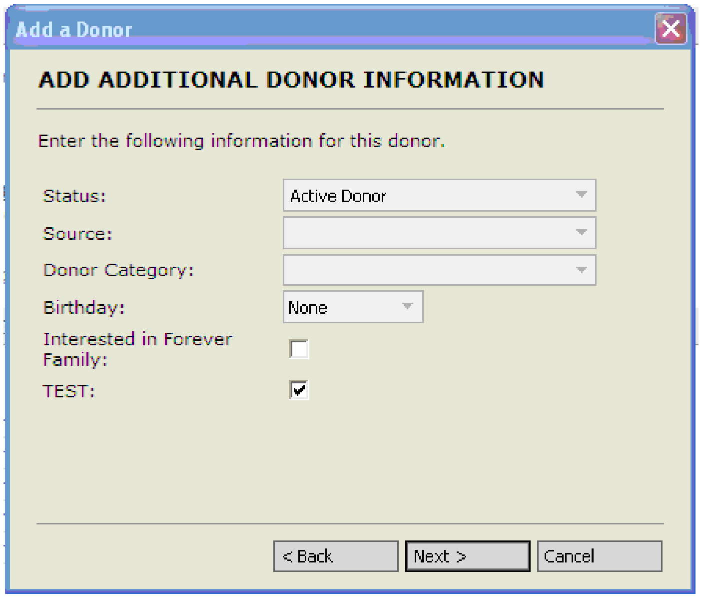
On the sixth step of the Add a Donor process, select any groups you want to add the new donor to. Any default group selections made when setting up your database or in the Settings section will be preselected.

Selecting Donor Mailing List

On the seventh step of the Add a Donor process, select any mailing lists you want to add the new donor to. Any default mailing list selections made when setting up your database or in the Settings section will be preselected.

Add Additional Donor Information

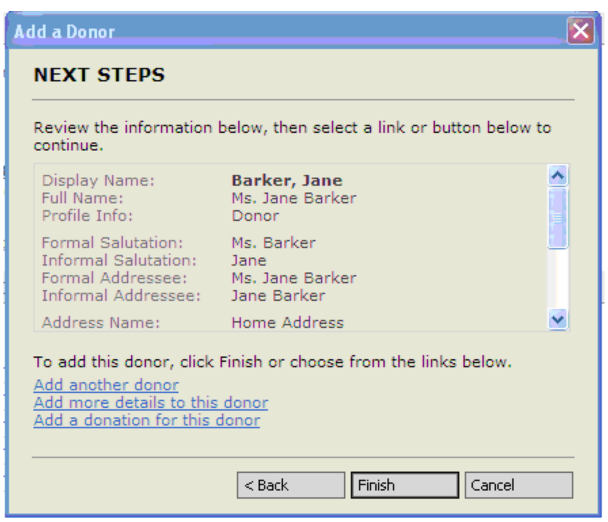
On the eighth step of the Add a Donor process you can choose to add additional fields to the add donor process. You will set up these fields in Settings / Customize /Manage Fields for Adding Donors.



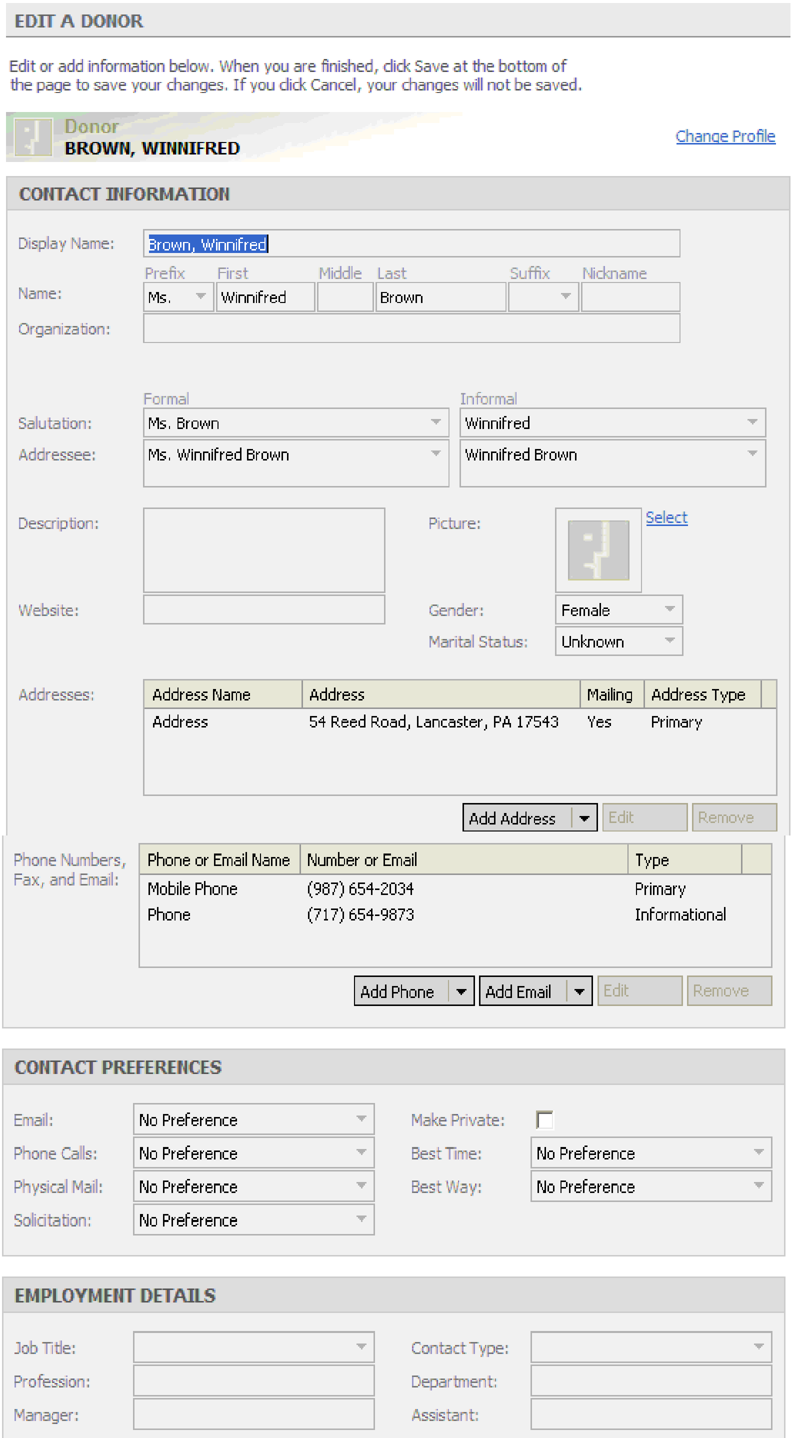
Verify Donor
The ninth step of the Add a Donor process gives you an opportunity to verify some of the information you've entered for the donor you are adding.

You can click the **Back** button to go back to any previous step and change the data you've entered. Or you can click **Finish** to complete adding the new donor to your database.

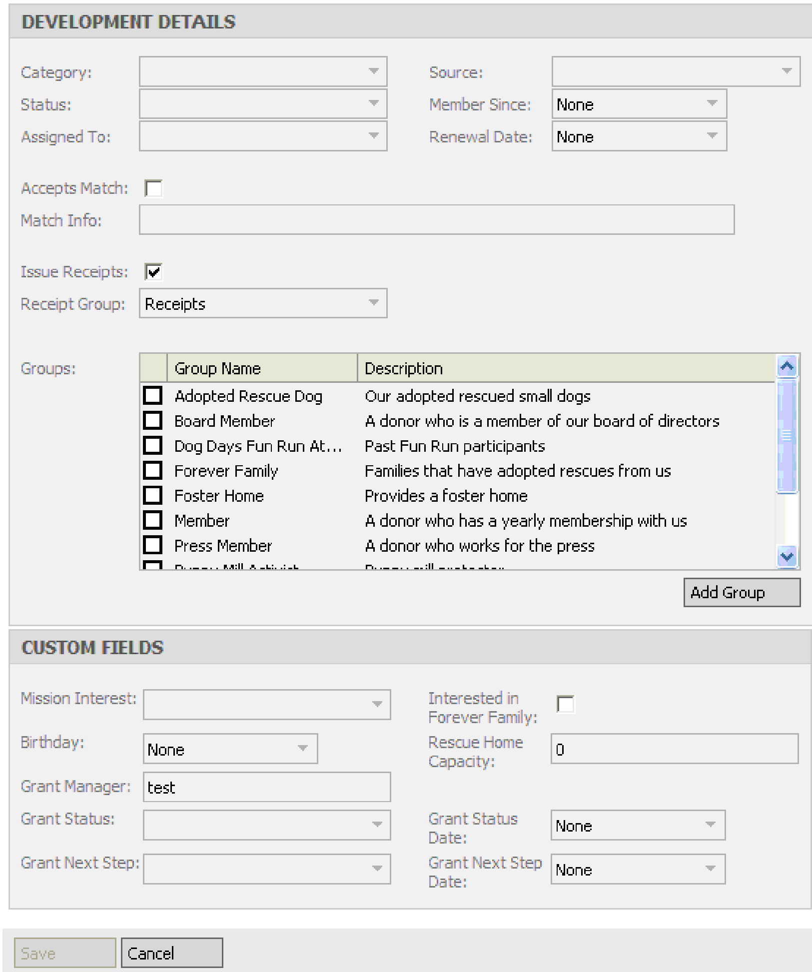
There are also links available to **Add another donor**, **Add more details to the current donor**, or **Add a donation for the current donor**.



Edit a Donor
After you add a donor you can later choose **Edit a Donor** to change or add donor information.



EDIT A DONOR
Edit or add information below. When you are finished, click Save at the bottom of the page to save your changes. If you click Cancel, your changes will not be saved.
Donor
BROWN, WINNIFRED
Change Profile
CONTACT INFORMATION
Display Name:
Brown, Winnifred
Prefix
First
Middle
Last
Suffix
Nickname
Name:
Ms.
Winnifred
Brown
Organization:
Formal
Informal
Salutation:
Ms. Brown
Winnifred
Addressee:
Ms. Winnifred Brown
Winnifred Brown
Description:
Picture:
Select
Website:
Gender:
Female
Marital Status:
Unknown
Addresses:
Address Name
Address
Mailing
Address Type
Address
54 Reed Road, Lancaster, PA 17543
Yes
Primary
Add Address
Edit
Remove
Phone Numbers, Fax, and Email:
Phone or Email Name
Number or Email
Type
Mobile Phone
(987) 654-2034
Primary
Phone
(717) 654-9873
Informational
Add Phone
Add Email
Edit
Remove
CONTACT PREFERENCES
Email:
No Preference
Make Private:
Phone Calls:
No Preference
Best Time:
No Preference
Physical Mail:
No Preference
Best Way:
No Preference
Solicitation:
No Preference
EMPLOYMENT DETAILS
Job Title:
Contact Type:
Profession:
Department:
Manager:
Assistant:



You can change any of the Donor information on this screen. Click **Save** to save your changes or **Cancel** to leave this screen without saving your changes.

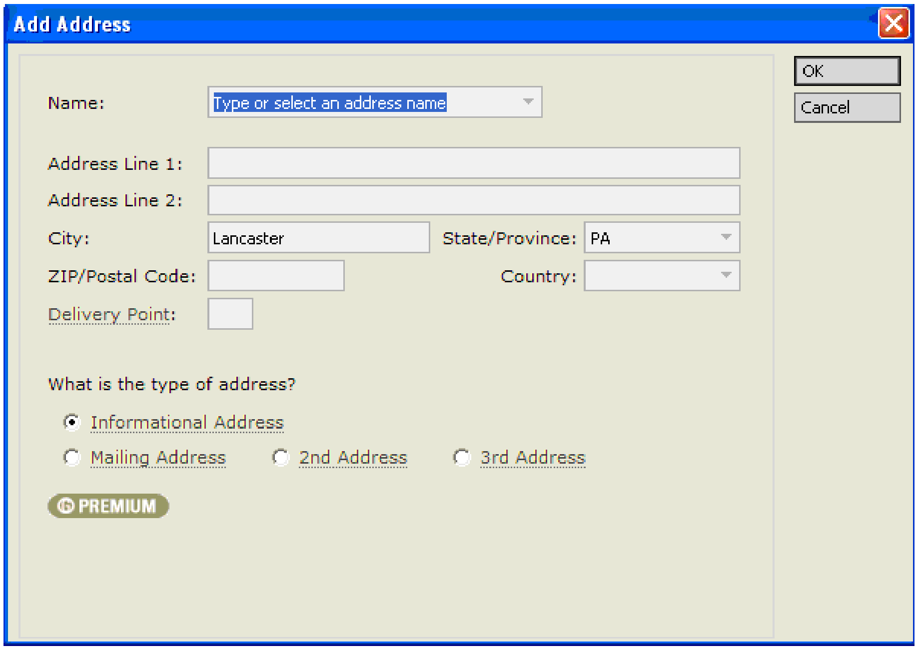
To change the donor's Profile, click the **Change Profile** link at the top right.

If you change the Display Name, Name, or Organization, GiftWorks will remind you to make changes to the Salutation and Addressee fields as necessary.

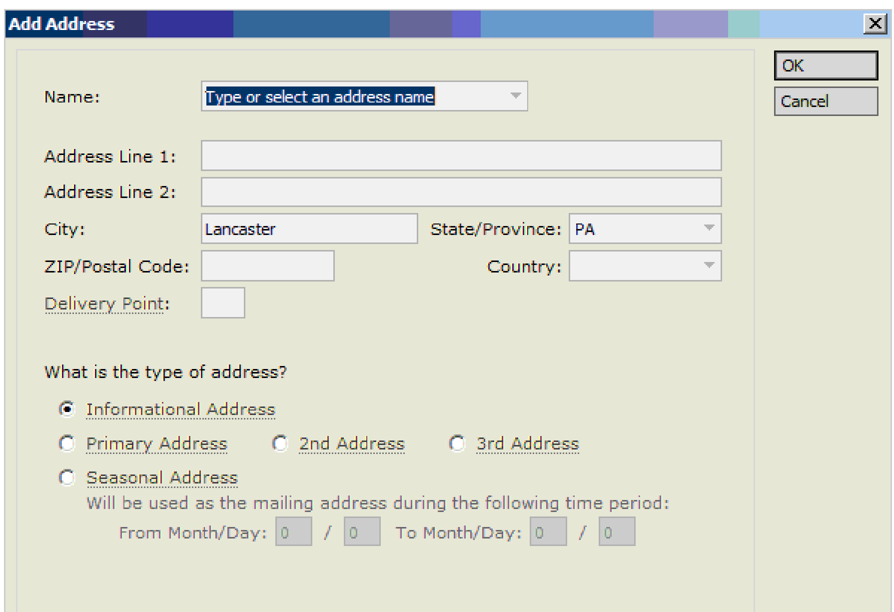
Multiple Donor Addresses

STANDARD

Click **Add Address** to add a donor mailing, informational, 2nd or 3rd address. One address must be designated as the Mailing Address. If you add an address and designate it as the Mailing Address during editing, saving it will overwrite the existing donor mailing address designation.



PREMIUM
Click **Add Address** to add Seasonal, Informational, 2nd or 3rd addresses for a donor.



You may need to enter multiple addresses for donors who reside at different places during the year (for example if they have a summer home). Entering a seasonal address lets you send them mail at their different addresses throughout the year.

Each time you sign in, GiftWorks checks for any seasonal addresses that need to be activated based on the current date. All mailings sent from GiftWorks will be sent to the seasonal addresses specified to be active on the day of the mailing. When the time period ends, the current mailing address automatically changes back to the Primary Address.

If a donor has more than one Seasonal Address or wants to receive mail at the Seasonal Address at different times throughout the year, you will need to add each of the Seasonal Addresses and corresponding time periods for the donor.

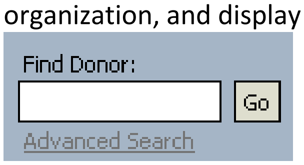
The current mailing address is indicated in the Addresses field when a donor has multiple addresses.

You can also add the Delivery Point code for donor addresses. The Delivery Point code can be imported into GiftWorks if the mailing addresses have been CASS-certified or can be manually entered.

Click **Save** after editing donor information.

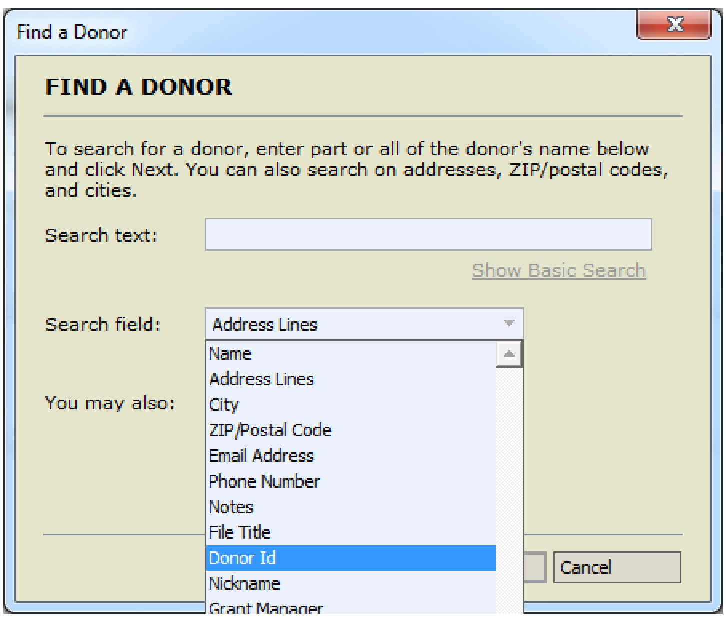
FINDING A DONOR

You can search for any donor by typing search information into the **Find Donor** box in the bottom left corner of GiftWorks and clicking **Go**. You can enter part or all of a donor's name. GiftWorks will find all donors that contain what you enter. By default, GiftWorks will search first name, last name, organization, and display name.

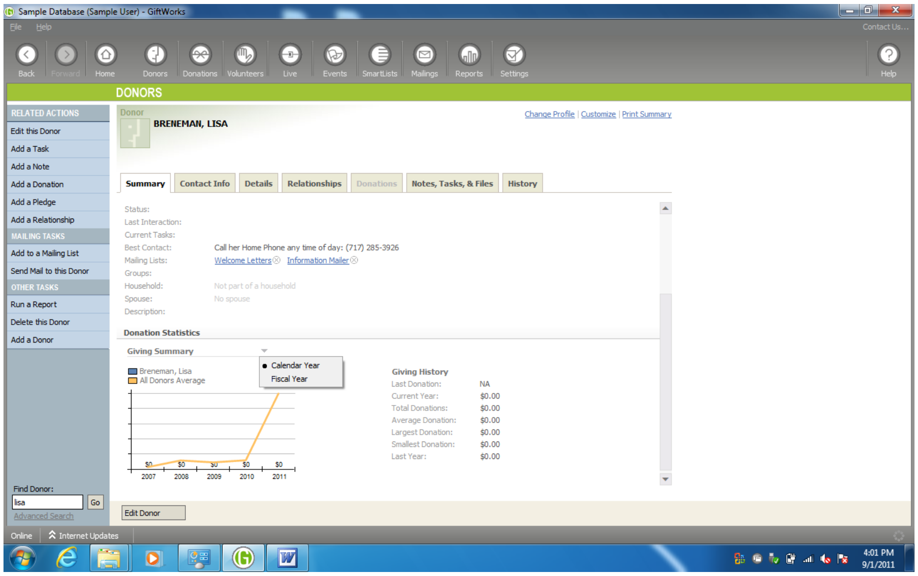


To search additional fields, click the **Advanced Search** link at the bottom left corner of GiftWorks. In the advanced search window, choose which fields to search, including all name fields, address fields, email address,Phone, Notes, File Title and any textbox donor custom fields you have added. There is also an option to "include names that sound like" when searching by the Name field.

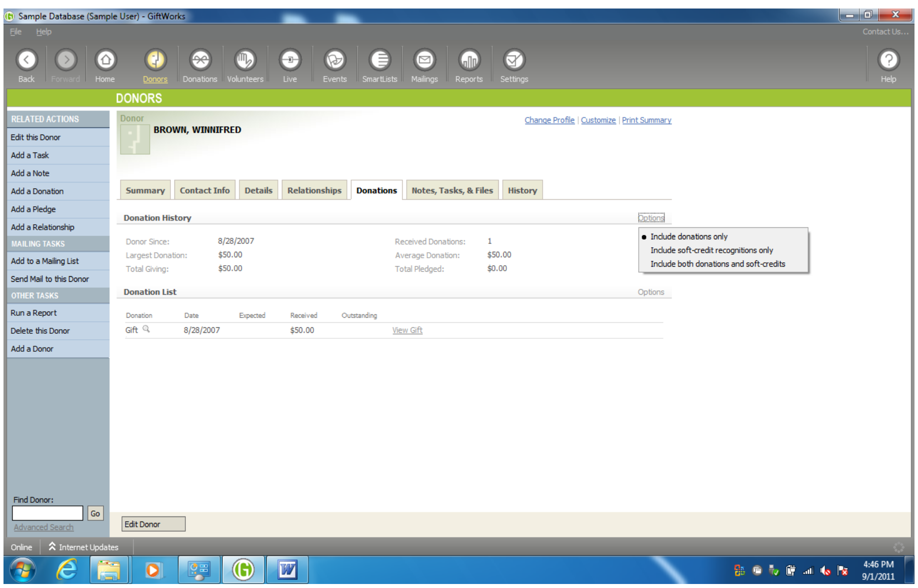
Can also search by Donor Id:



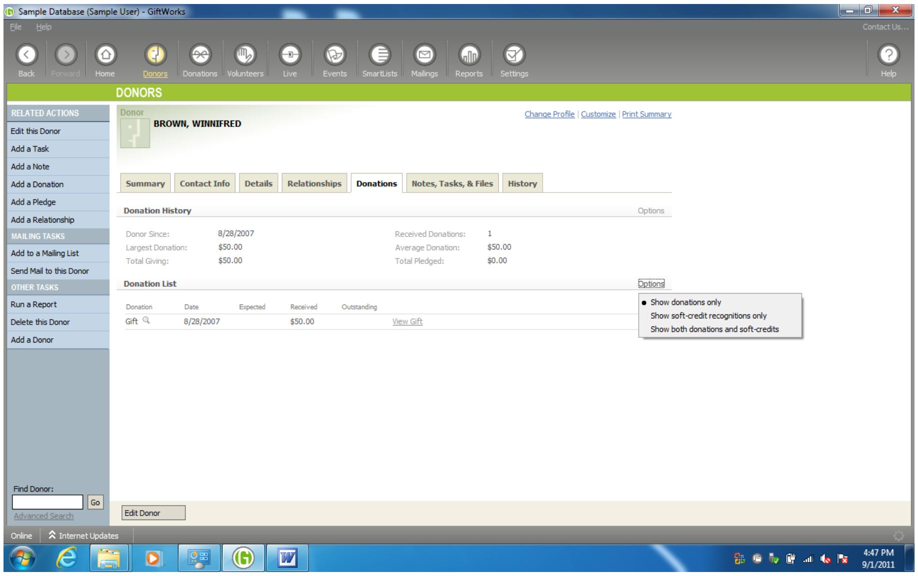
Donor Summary tab - Donation Statistics: Can now choose Giving Summary for Calendar Year or Fiscal Year



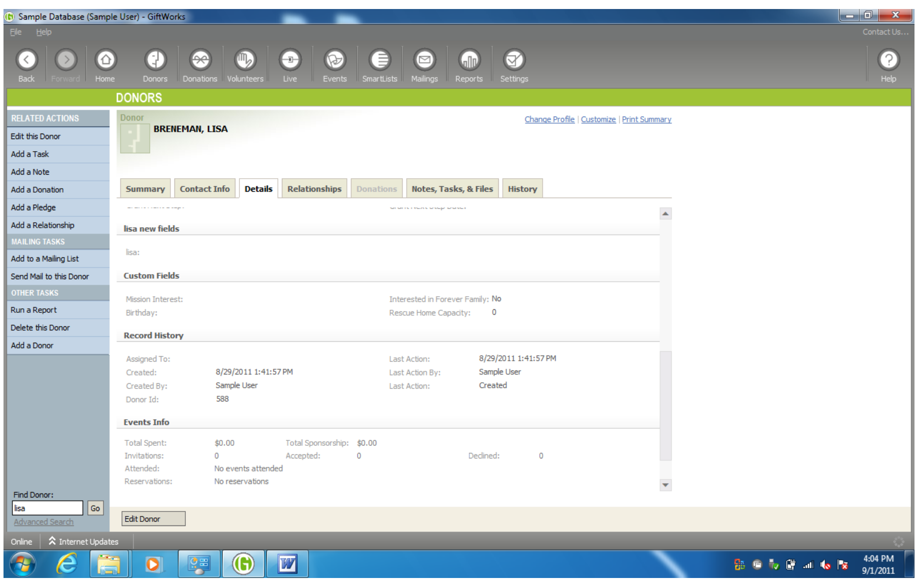
Donations Tab - Donation History: Options (This is PER GiftWorks USER)
Can choose to Include Donations Only, Include soft-credit recognitions only, or Include both donations and soft-credits



Donations Tab-Donation List: Options (This is PER GiftWorks USER)
Can choose to Include Donations Only, Include soft-credit recognitions only, or Include both donations and soft-credits



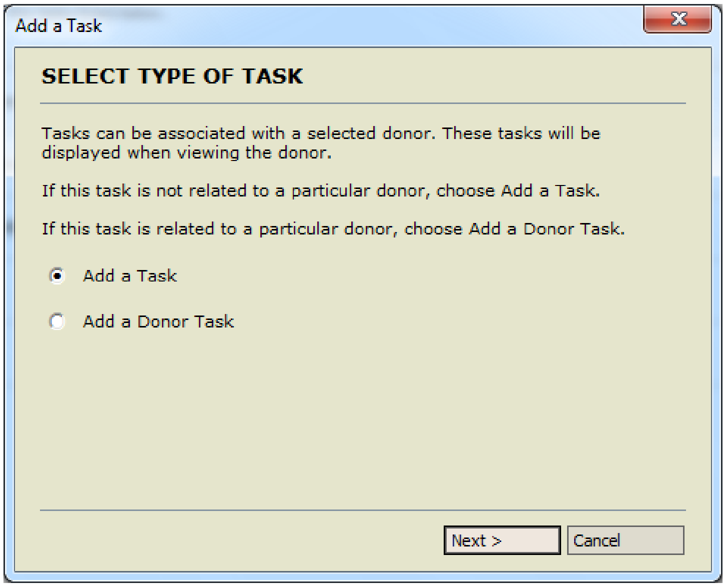
GiftWorks Donor Id: Can now see the Donor Id in a Details tab under Record History area within a donor profile.

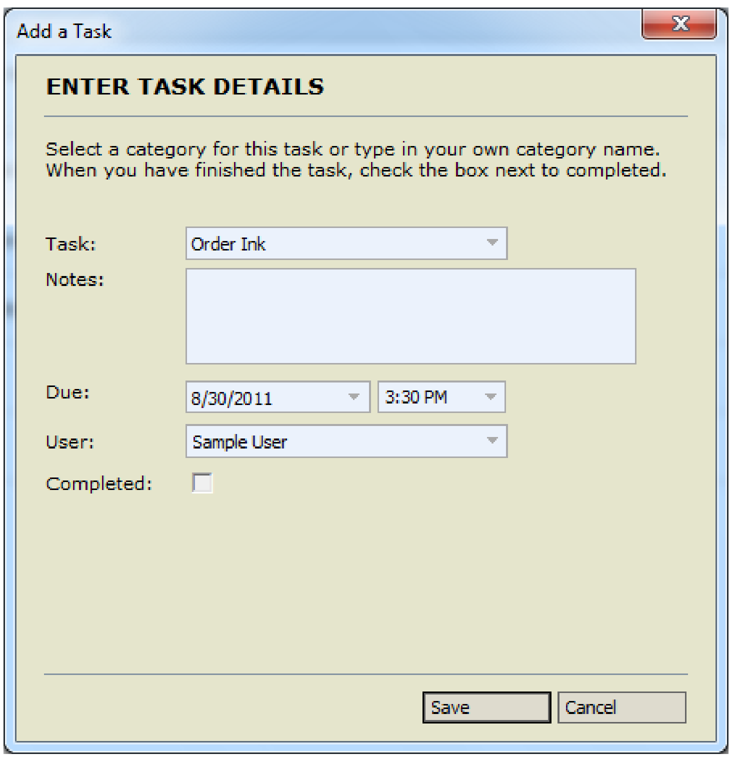


Note,Tasks & Files tab:

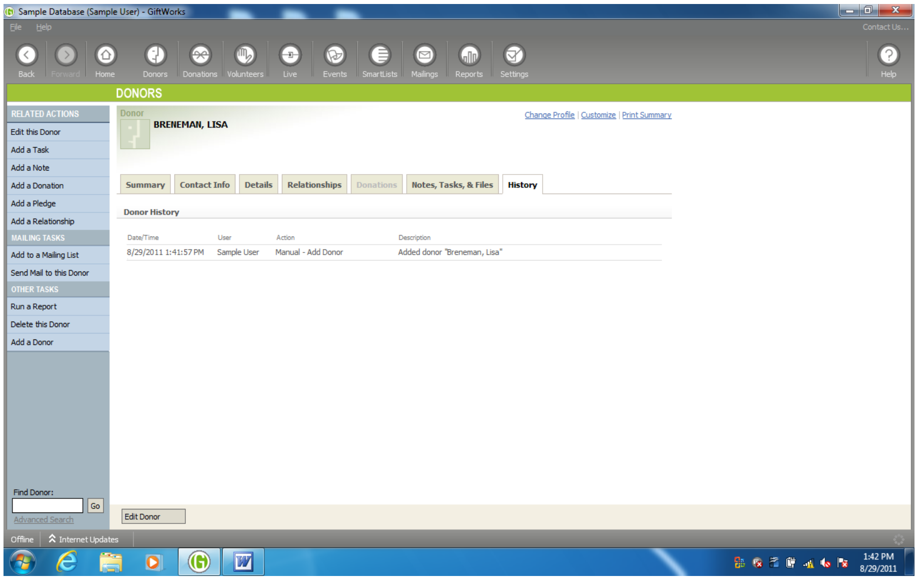
You have the ability to assign tasks to other users and the ability to create tasks that are not associated with a donor (e.g. order ink for printer). You also have the ability to add alert notes that provide special notification every time the donor is viewed. Other changes include the ability to specify the note date and know when a note or task is added or changed and by whom.

New Add Task dialog:

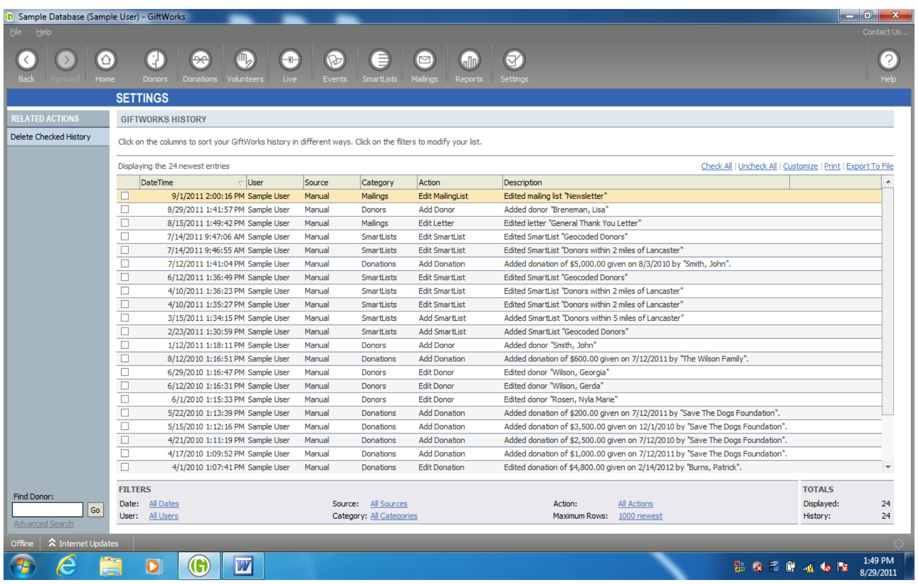




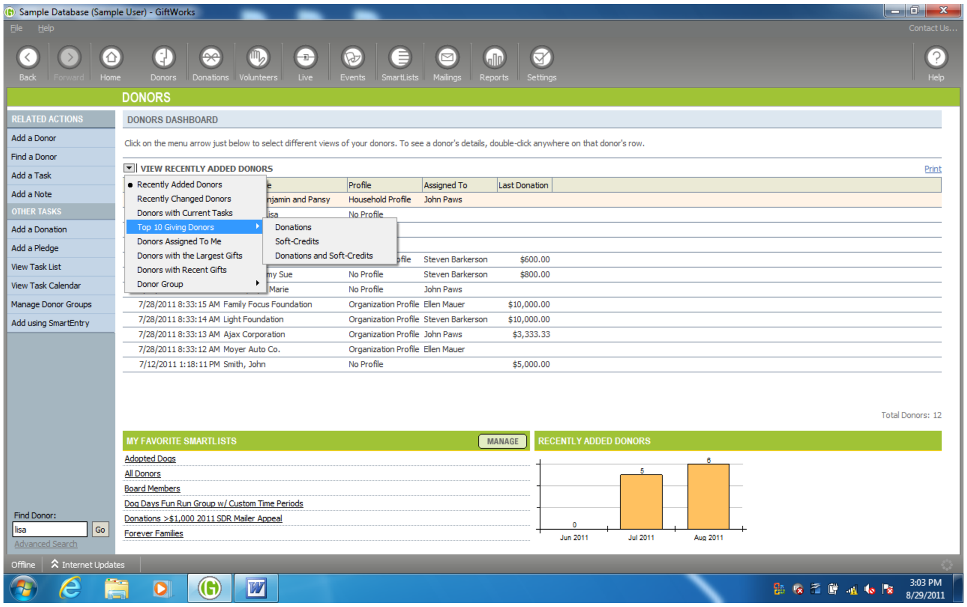
New "History" tab on donor profile: GiftWorks will now keep a history of actions that have been performed. Examples are adding, modifying or deleting a donor or donation; adding or removing a pledge payment; receiving a pledge payment; adding, modifying or deleting a letter template; adding, modifying or deleting a SmartList and so on. It will be possible to search and print the activity for specific users, dates and actions. One practical application is that users will be able to review the actions of individual users.



Go to Settings/ Database,Files and Maintenance / Manage GiftWorks History



Donor Dashboard:
Can now show Donations, Soft-Credits or Donations and Soft-Credits for the Top 10 Giving Donors.


Sample Database (Sample User) - GiftWorks
DONORS
RELATED ACTIONS
Add a Donor
Find a Donor
Add a Task
Add a Note
OTHER TASKS
Add a Donation
Add a Pledge
View Task List
View Task Calendar
Manage Donor Groups
Add using SmartEntry
DONORS DASHBOARD
Click on the menu arrow just below to select different views of your donors. To see a donor's details, double-click anywhere on that donor's row.
VIEW RECENTLY ADDED DONORS
Recently Added Donors
Recently Changed Donors
Donors with Current Tasks
Top 10 Giving Donors
Donors Assigned To Me
Donors with the Largest Gifts
Donors with Recent Gifts
Donor Group
Donations
Soft-Credits
Donations and Soft-Credits
Total Donors: 12
MY FAVORITE SMARTLISTS
MANAGE
Adopted Dogs
All Donors
Board Members
Dog Days Fun Run Group w/ Custom Time Periods
Donations >$1,000 2011 SDR Mailer Appeal
Forever Families
RECENTLY ADDED DONORS

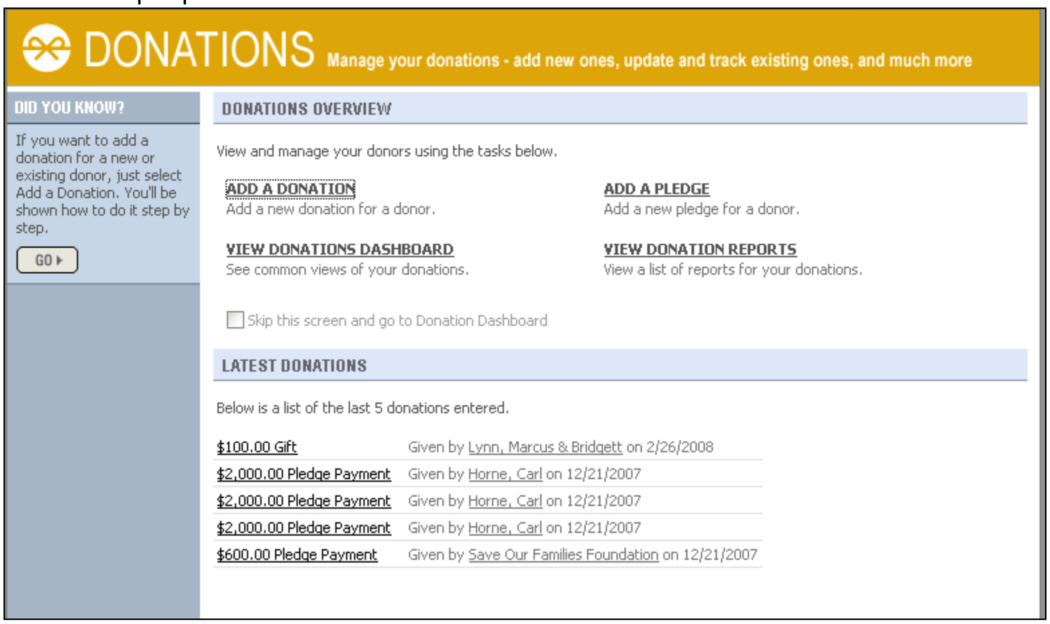
DONATIONS

IN THIS SECTION

Sending Honorarium and Memorial Notifications

DONATIONS OVERVIEW

Donations are a vital source of revenue, and accurately tracking them is an essential function for your nonprofit. Tracking how donations were made, why they were made, and who made them helps you refine your fundraising processes and can increase both the amounts you raise per donor and the number of people who donate.



GiftWorks defines a donation as a “gift” or “pledge payment” made to your organization, not including receivables. A “pledge” is defined as a promise from a donor to make one or more payments in the future. Payment types include money, in-kind contributions, and securities. You can also add custom payment types.

With GiftWorks, adding a donation or pledge is easy and straightforward—just click any **Add a Donation** in the menu on the left side and follow the instructions.

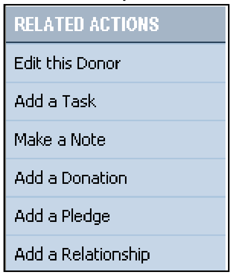
GiftWorks lets you to track donations, pledges, matching gifts, memorials, campaigns, and giving histories. GiftWorks automatically generates receipts for every donation, and optionally lets you add the donor to the Thank You Letters mailing list so you can easily acknowledge your donors.

Using the power of SmartLists, you can view the All Donations SmartLists, or create a SmartList of donations based on criteria you choose. For instance, you can create a SmartList of donations over $500 from Pennsylvania donors, then save the list as “PA Donors Over $500.” Any time you want to see those donations, just click on the list. As you add new donations that meet those criteria, their donors will appear in that SmartList.

ADDING A DONATION

You can add unlimited donations for each donor in GiftWorks, and you can record a great degree of detail about each donation, making analysis more accurate, meaningful, and comprehensive. Each donation is tracked in the donation history of the donor and as part of your organization’s donations.

There are a number of ways to add a donation for a donor. You can go to the donor record and choose **Add a Donation** from the **Related Actions** menu, or go to the Donations section and click **Add a Donation** in **Related Actions**. Add new gifts or apply pledge payments to a donor using the Add a Donation process.



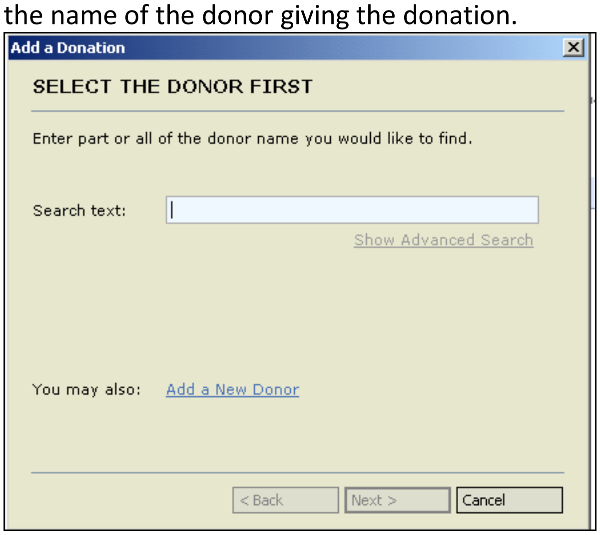
Each time you add a gift or payment for a donor, you will have the choice of whether or not to issue a Receipt. The default value for the donor will appear, but you can override that each time if you need to.

You can also add the donor to the Donation Thank You Letter mailing list during the Add Donation process. These mailings are ready to send in the Mailings section.

The links below describe how to add a new donation. For details on how to apply a pledge payment, see Apply a Pledge Payment.

Selecting a Donor

To add a donation, you must first tell GiftWorks who is giving it. Using the search box provided, enter the name of the donor giving the donation.



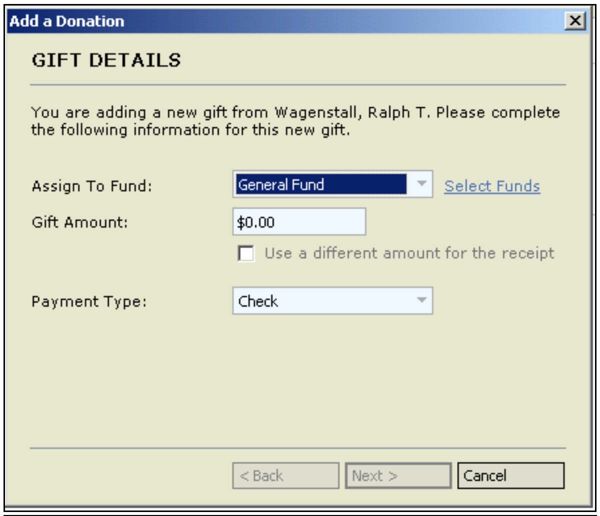
If the donor has not yet been added to GiftWorks, click **Add a Donor** at the bottom of the window. Once you have selected a donor, click **Next** to continue.

Selecting Donation Type

If the donor has outstanding payments due on a pledge, you must choose the donation type for your entry. Click **Add a Gift**, then click **Next** to continue.

Entering Gift Details

To enter a donation, you must enter fund and payment details for your donation, including the following information.



Assign To Fund: Funds identify how the donation will be allocated within your organization. You can choose to assign the entire donation to one fund, or you can split it between multiple funds.

To apply a gift to multiple funds, click **Select Funds** beside the **Assign To Fund** field. Click the checkbox in the **Include** column beside each fund you want to assign a portion of the fund to. Assign an amount to each of those funds by clicking the box in the **Amount** column next to the fund and entering the desired amount. Summary information is included at the bottom of the window, showing the unassigned donation amount and ensuring that you allocate the correct total amount.

Gift Amount: Here you enter the donation amount. You can use a different amount for your donation receipt by clicking the checkbox below the amount. If you use a different amount for the donation receipt, you must indicate that amount on the next page.

Payment Type: Select the payment method for the donation. Payment types include money, in-kind contributions, and securities.

If you select a payment method other than cash, a Payment Detail page with additional fields will appear. For example, for donations made in the form of equipment, you can enter a description of the equipment, the manufacturer, the model, serial number, and condition of the equipment.

Indicating Donation Options

You can indicate if the gift is given in honor of or in memory of someone, and if the gift will be matched by a donor. You can add memorials and honoraria in Settings or choose the 'Add new honorarium/memorial' option from the dropdown list when adding the donation.

Acknowledging / Receipting Donations

You can choose a method to thank the donor for the gift by clicking the desired acknowledgment method.

Acknowledge Later: If you choose to acknowledge later, GiftWorks will not add the donor to the Donation Thank You Letters mailing list. You can acknowledge the donation later from the donation view.

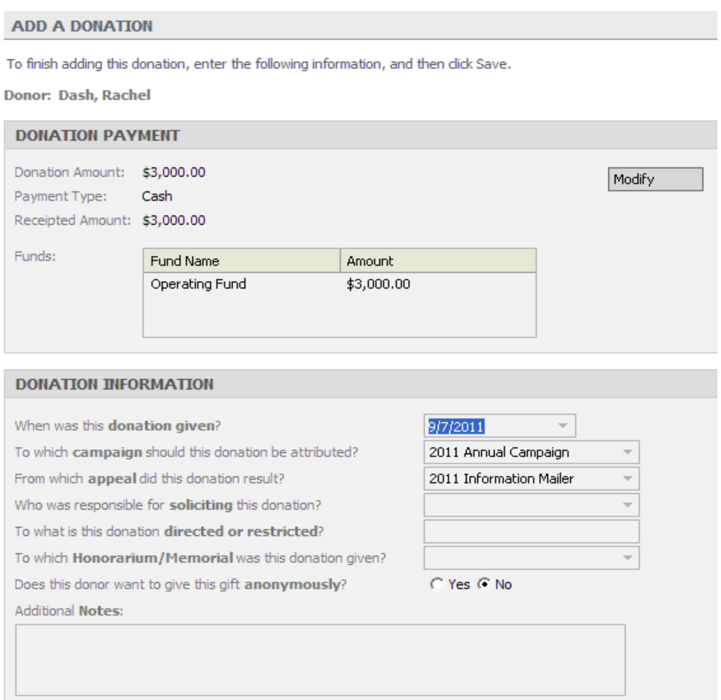
Add to 'Thank You Letters' mailing list: This option adds the donor to the Donation Thank You Letters mailing. You can send your Donation Thank You letters from the Mailings section at any time. If you choose this option, the donation can automatically be set as "Acknowledged" once the mailing has been completed.

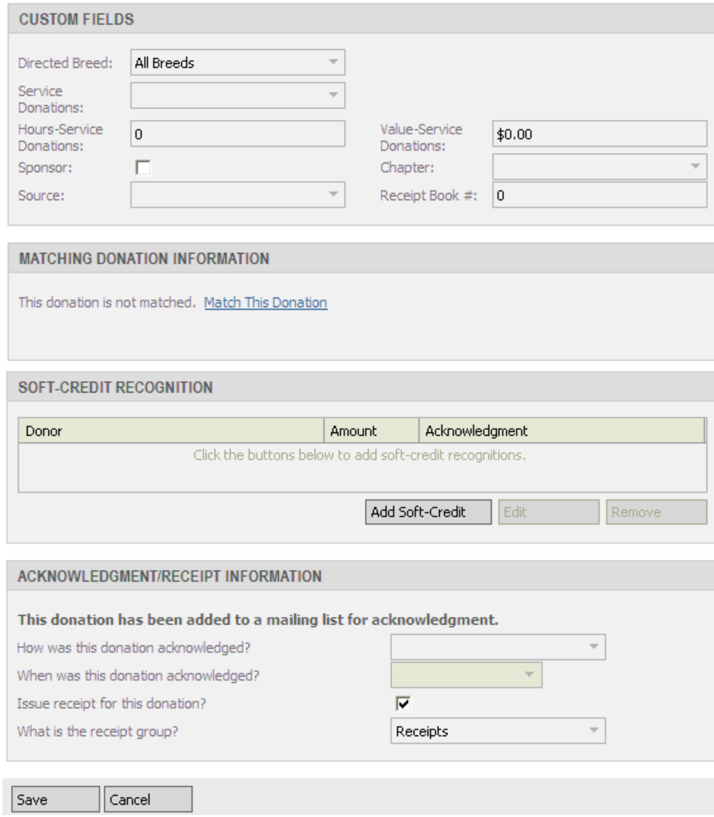
Other: Select from four other acknowledgement methods, including phone call, thank you note, in person, and thank you gift, or enter your own information for how the gift was acknowledged. Indicate the date of the acknowledgment using the date field provided.

Receipt Information: Choose whether or not you want to issue a Receipt for this donation. If so, choose the Receipt Group to add the donation to.

Completing and Editing Donations

After entering a donation, a screen appears that shows the full donation. You can add additional details about the donation here. You can also visit this screen anytime to edit the information by double-clicking on a donation.





Donation Payment: The top of the page shows the Donation Payment information you just entered. Click **Modify** to change the payment information, including the fund that the donation is directed to, the gift amount, the receipted amount, and the payment type.

Donation Information: The next section is the detailed Donation Information. Here, you can:

- Select the date on which the donation was given
- Select the campaign to which the donation should be attributed
- Select the appeal from which the donation resulted
- Select the person who was responsible for soliciting the donation
- Indicate donation directions and restrictions
- If applicable, change the honorarium/memorial to which the donation is given
- Choose whether the donor wishes to give anonymously
- Add other notes

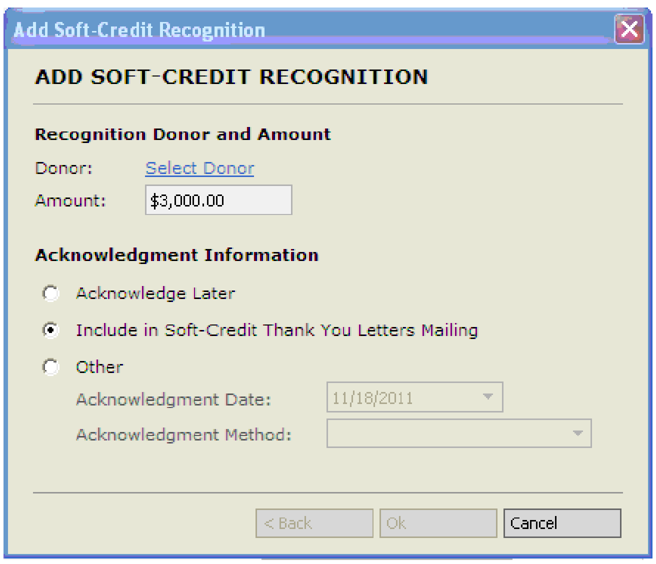
Custom Fields: This section shows the custom donation fields you have added in Settings. You can include custom donation fields in your SmartList criteria, your customized views of SmartLists, your exports, your Letter templates in the Mailings section, and your labels fields in the Mailings Section.

Matching Donation Information: You can add a matching pledge by clicking **Match This Donation**. You can select or add the matching donor to GiftWorks and indicate how much of the donation they will match. A corresponding pledge will be automatically created. If the donation is already matched, you can clear the match by clicking **Clear This Match**.

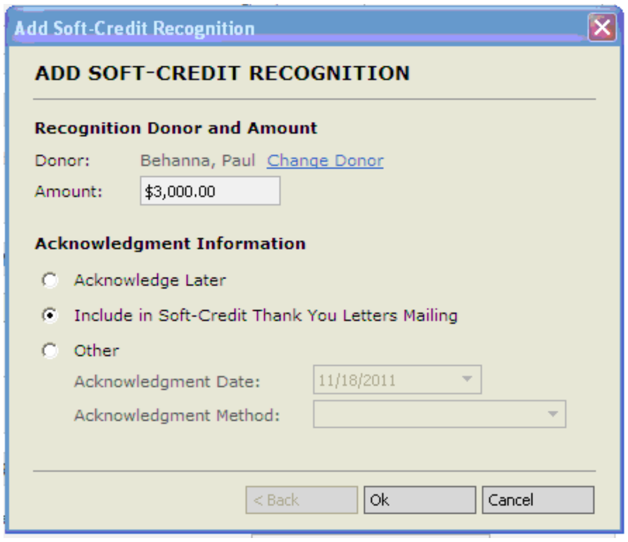
Soft-Credit Recognition: Soft credit donation recognition refers to assigning credit for a donation to one or more donors who cannot be credited for the gift from a legal or tax-credit standpoint but in some way influenced the donation. One common example is when a donor gives a gift through a charitable foundation. The charitable foundation is the legal donor and needs to be issued the receipt but the donor designating the gift needs to be recognized.

GiftWorks will allow soft credit donors to be assigned when adding a donation and provide an easy way to acknowledge these donations in a mailing. Soft credit donations will be able to be displayed when viewing a donor's giving history. In addition, soft credit donations will be available on certain reports and be optionally included in total giving for certain SmartList criteria and reports.
**You cannot apply Soft-Credit to an Affiliate donor- it will change then to a "donor"

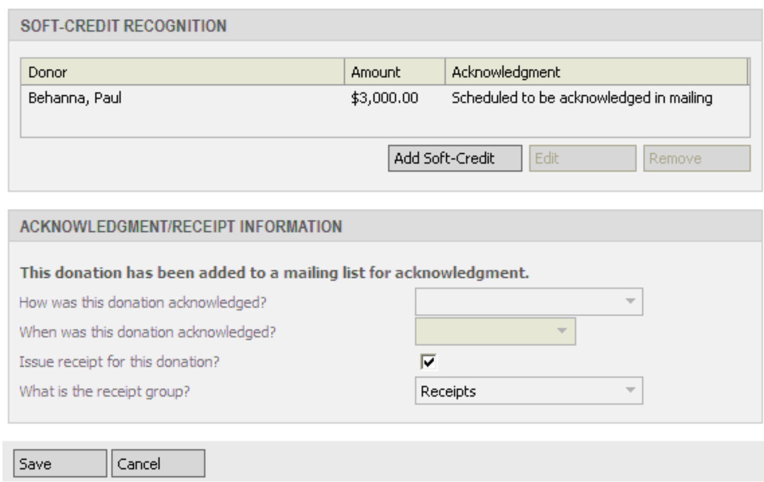
To add a Soft Credit: On the 'full page' add donation screen, you can scroll down to the 'Soft-Credit Recognition' area:
Click the 'Add Soft-Credit" button, then click on the 'Select a Donor' link:



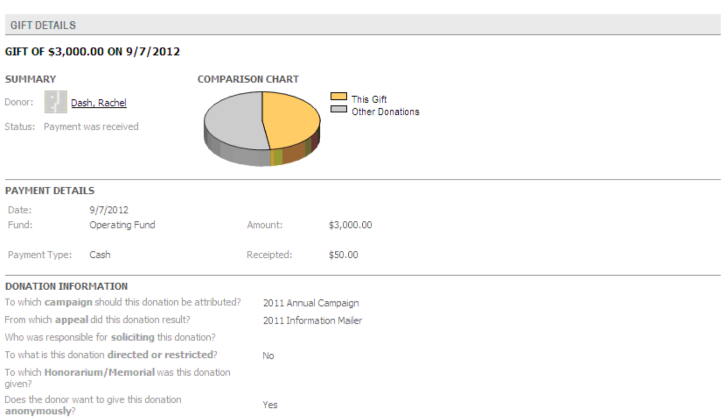
Choose the donor to apply the Soft-Credit to and the amount.

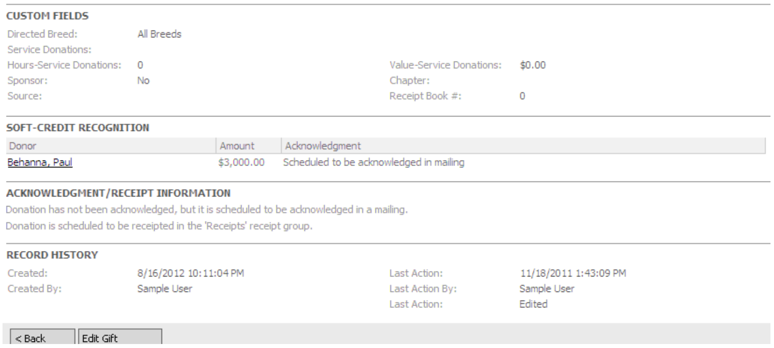


You can also choose to add the Soft-Credit to the Soft-Credit Thank You Letters Mailing List
You will see the Soft-Credit information listed here when adding or editing a donation:



You will see the Soft-Credit information listed here when viewing a donation:

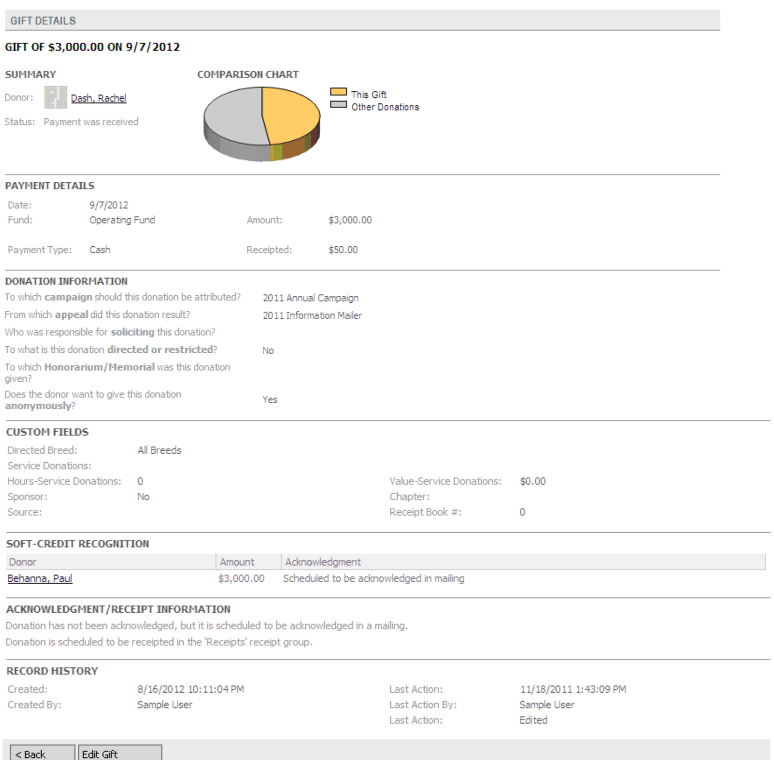




Acknowledgment/Receipt Information: The section shows the acknowledgment method and Receipt options you have chosen.

Saving Donations

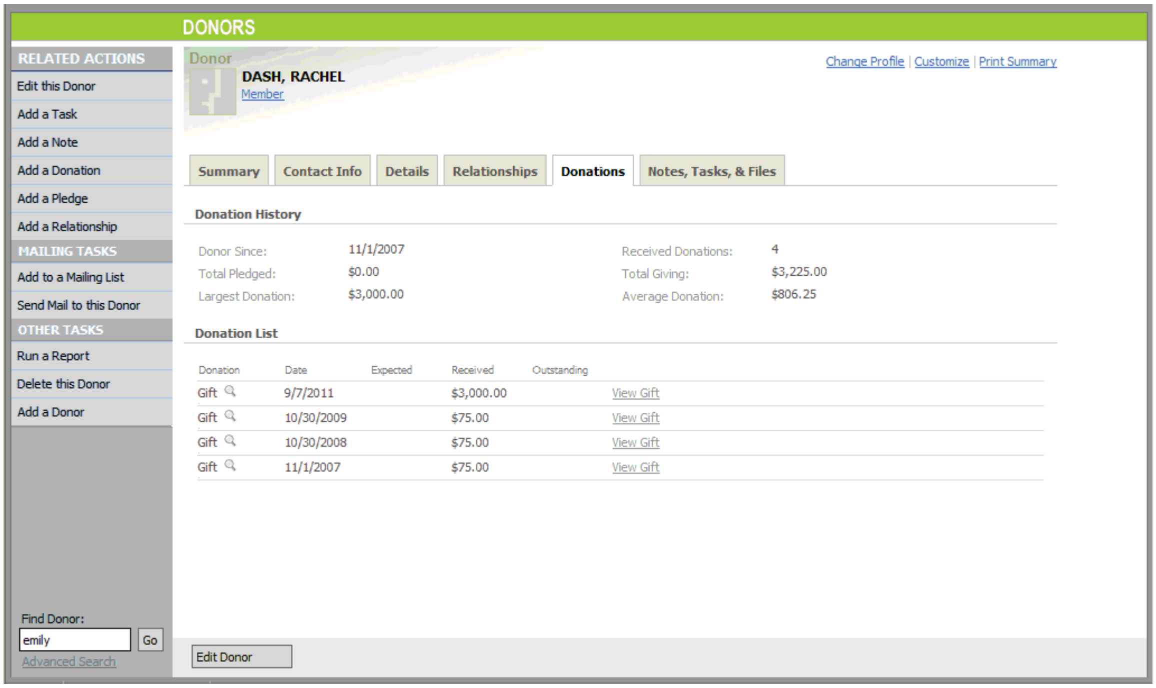
After you have entered all of the information about a donation, click **Save**. You will then be able to view all of the donation information for this donation.



After you save the donation, and if you chose to Acknowledge Later in the Add a Donation process, you can choose a method here by clicking **Acknowledge Now**.

Viewing and Finding Donations

When viewing a donor, you can see his or her donations by clicking the **Donations** tab.



You can also view a donation in a SmartList of donations, such as the All Donations SmartList. Or you can create a SmartList of donations based on any of the information you stored in the donations.

PLEDGES OVERVIEW

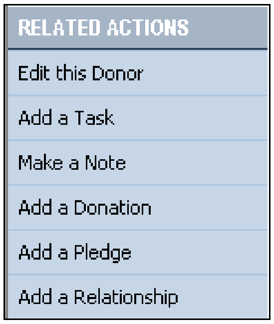
GiftWorks defines a pledge as a commitment made by a donor to your organization to donate a specified amount on a future date or dates. Pledge payments can be spread out over time. Each payment toward a pledge is recognized as a donation. Add pledges from a donor record through the Add a Pledge process. Apply pledge payments through the Add a Donation process or directly from the pledge.

You can add multiple pledges for each donor in your GiftWorks database. Each pledge contains the pledge payment schedule, including received, scheduled, overdue payments, and other pledge information. You can apply payments to pledges, and create reports to view received payments versus expected payments. Each pledge is a part of the pledge history of the donor.

For your convenience, pledge entry is directly connected to your mailing processes. Each time you add a pledge for a donor, you can choose to add the donor to a “Pledge Thank You Letters” mailing list. Also, each time you apply a payment to a pledge, You have the option to control the Acknowledgement and Receipting options. These mailings are ready to send in the Mailings section of GiftWorks.

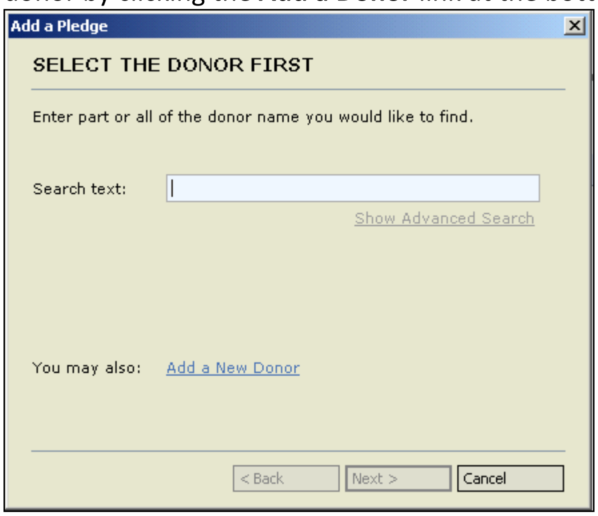
ADDING A PLEDGE

There are two ways to add a pledge to your database. You can either first view a donor and then add a pledge from the **Related Actions** menu on the left, or click the **Donations** icon at the top of GiftWorks, then click **Add a Pledge** in the **Related Actions** menu.



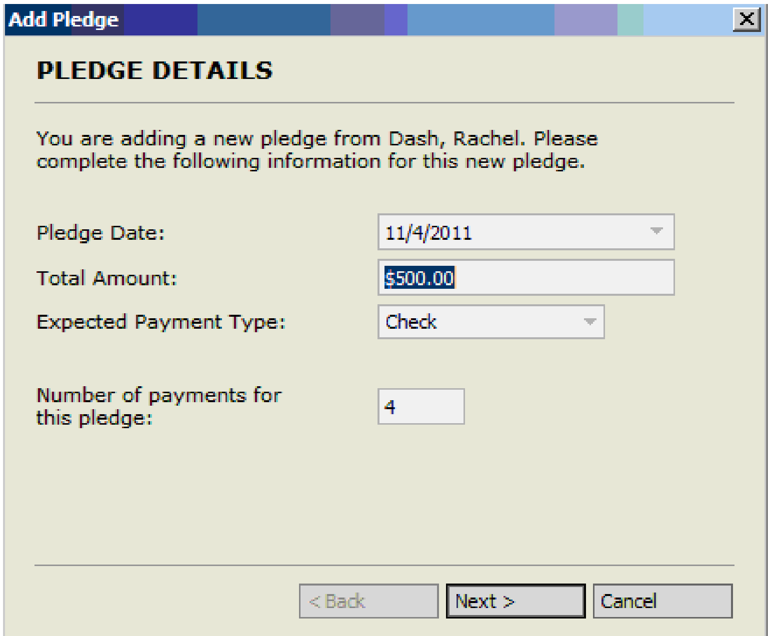
Selecting a Donor

To add a pledge, you must first identify the donor. Using the search box provided, you can find and select an existing donor. If the donor has not yet been added to your database, you can add a new donor by clicking the **Add a Donor** link at the bottom of the window.



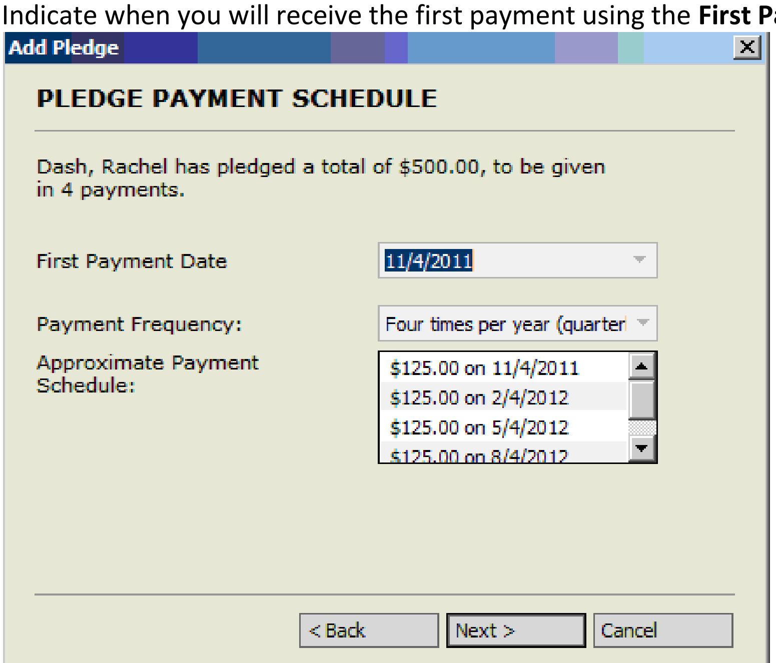
Entering Pledge Details

You are required to enter the date that the pledge was made and the total amount pledged. You can also indicate the number of payments that will be made on the pledge as well as the Expected Payment Type.



Specifying Pledge Payment Schedule

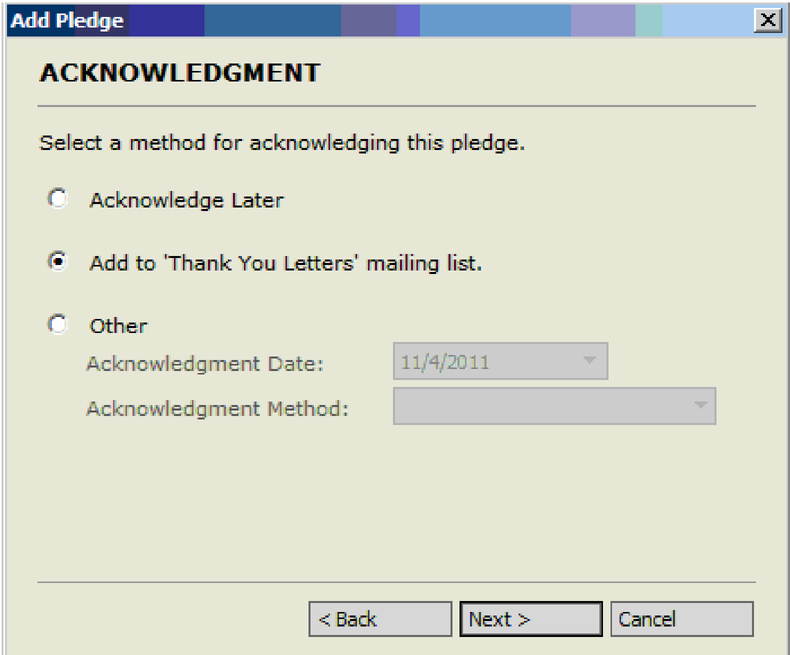
If there will be more than one payment made on the pledge, you must specify a schedule for payment. Indicate when you will receive the first payment using the **First Payment Date** selection box.



Then select a payment frequency from the list provided. This describes how frequently you will receive payments on the pledge. An **Approximate Payment Schedule** based on the selection you make will appear.

Acknowledging Pledges

You can choose a method to thank the donor for the pledge. Click the desired acknowledgment method from the following:



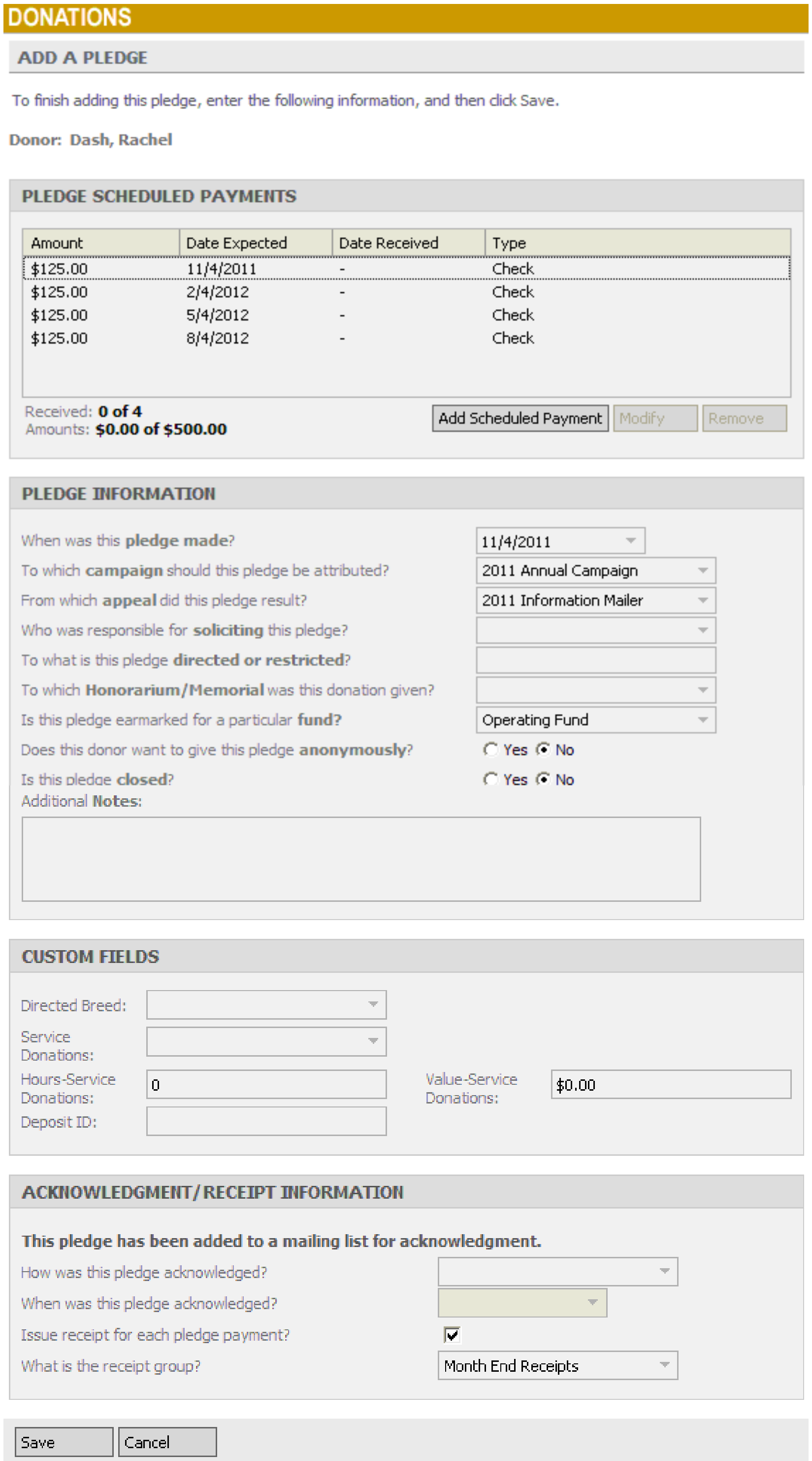
Acknowledge Later: If you choose to acknowledge later, you will be able to choose a method of acknowledgment for the pledge later.

Add to "Thank You Letters" mailing list: Choosing this option will add the donor to the "Pledge Thank You Letters" mailing. Simply go to the Mailings section of GiftWorks and proceed with the pledge mailing process to send the letter. If you choose this option, the donation can automatically be set as "Acknowledged" once the mailing has been completed.

Other: This option lets you choose a method of acknowledgment that is not related to mailing. You can select from four other methods, including phone call, thank you note, in person, and thank you, or enter your own information for how the gift was acknowledged. Indicate the date of the acknowledgment using the date field provided.

Completing and Editing Pledges

After entering a pledge, a screen appears that shows the full pledge. You can add additional details about the pledge here. You can also visit this screen anytime to edit the information by double-clicking on a pledge.



Pledge Scheduled Payments: The top portion of the page shows the Scheduled Payment information you have entered. Modify or remove a scheduled payment by clicking the payment and then clicking **Modify** or **Remove**. Payment modifications allow you to change the payment amount, the payment date, or the payment type.

To change the amount of the pledge, you can either add an additional payment, or modify the amount of one of the existing un-received payments. Note that you cannot remove or edit a payment that has already been entered into GiftWorks as received. You must first go to that payment and delete it, then return to this pledge screen. To do so, click **Cancel**, then click on the linked payment listing and then click **Delete this Payment** in the **Related Actions** menu.

You also cannot remove any pledge payment (received or expected) from this screen once the pledge's details have been posted to QuickBooks or to a file. To remove such a payment, click **Cancel**, then click on the linked payment listing and then click **Delete this Payment** in the **Related Actions** menu.

The payment type will be set to what you chose as your default payment type under Settings/Customize GiftWorks/Change Default Values for GiftWorks Fields. Payment type details are specified when you apply a payment. You can also add a new scheduled payment by clicking **Add Scheduled Payment**, but doing so will increase the total pledged amount.

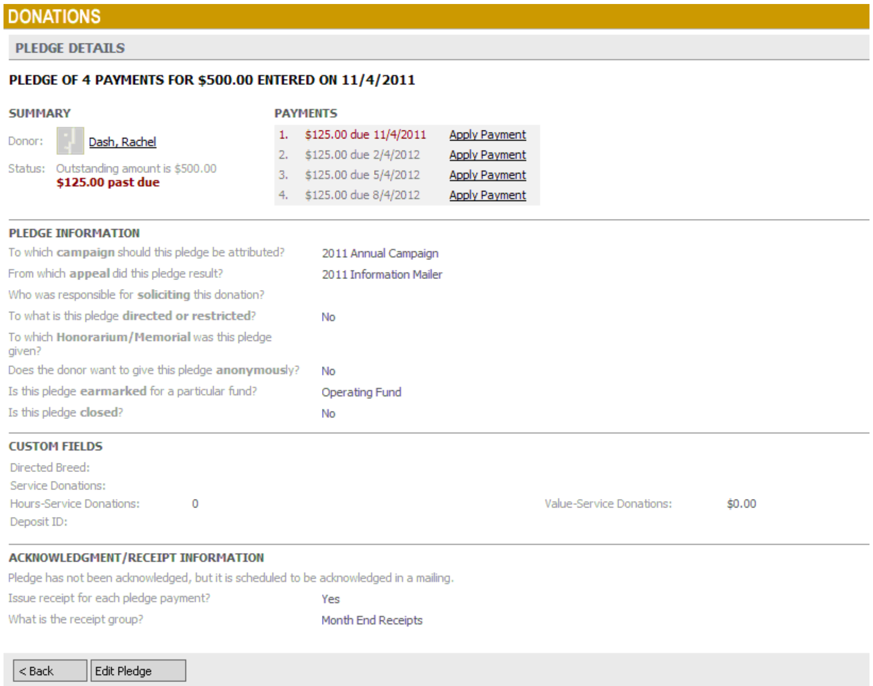
Pledge Information: The next section is the detailed pledge information. Here you can:

- Change the date the pledge was made
- Indicate the campaign the pledge should be attributed to
- Indicate the appeal the pledge resulted from
- Indicate the person who was responsible for soliciting the pledge
- Indicate pledge directions and restrictions
- Indicate the honorarium/memorial the pledge is given to
- Indicate if the pledge is earmarked for a particular fund
- Indicate if the donor wishes to give anonymously
- Indicate if the pledge is closed
- Add other notes

Custom Fields: This section includes any donation custom fields you have added through the GiftWorks Settings section.

Acknowledgment/Receipt Information: The section shows information about the acknowledgment method and receipting options you have chosen.

Saving Pledges
Review the information that is entered, then click **Save** to save the pledge. After you have saved the pledge, and if you chose to Acknowledge Later in the Add a Pledge process, you can choose a method here by clicking **Acknowledge Now**.



APPLYING A PLEDGE PAYMENT

There are two ways to apply a payment to a pledge. You can apply the payment through the **Add a Donation** process, or by opening the pledge and clicking **Apply Payment** next to the appropriate payment.

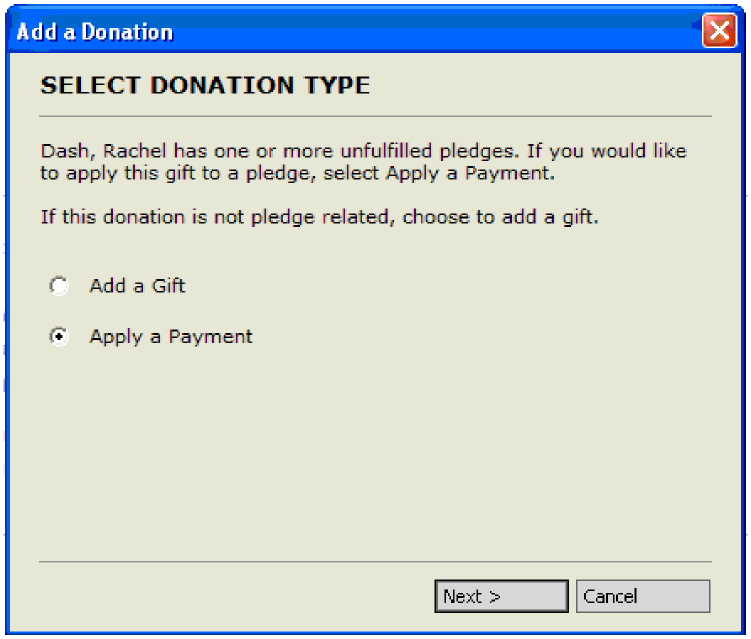
To apply a payment through the **Add a Donation** process, click **Add a Donation** from the **Related Actions** menu on the left and follow the instructions.

Selecting a Donor

Using the available search box, you can find and select an existing donor for the donation. Once you have selected a donor, click **Next** to continue.

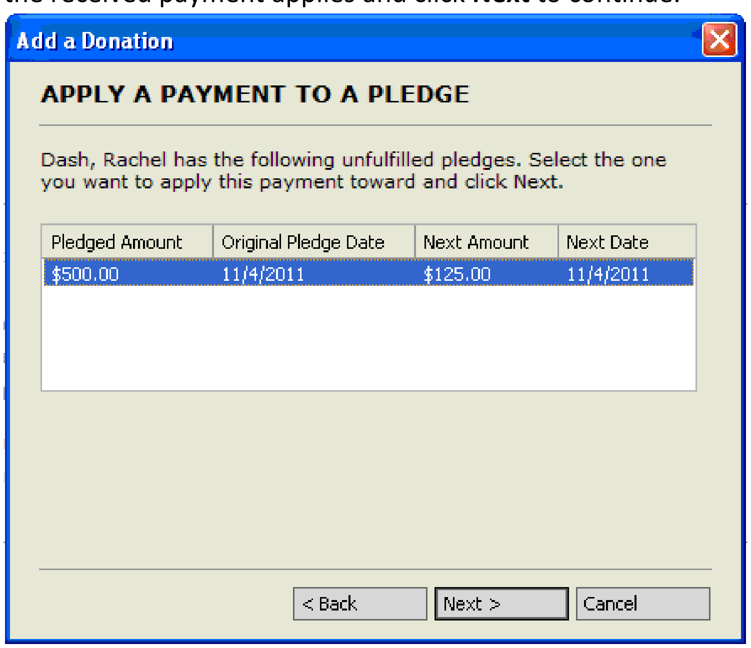
Selecting Donation Type

This part of the process lets you choose the donation type for your entry. Click **Apply a Payment** and click **Next** to continue. Donations can be “gifts” or “pledge payments.” Either way, donation types are only for “received” donations.



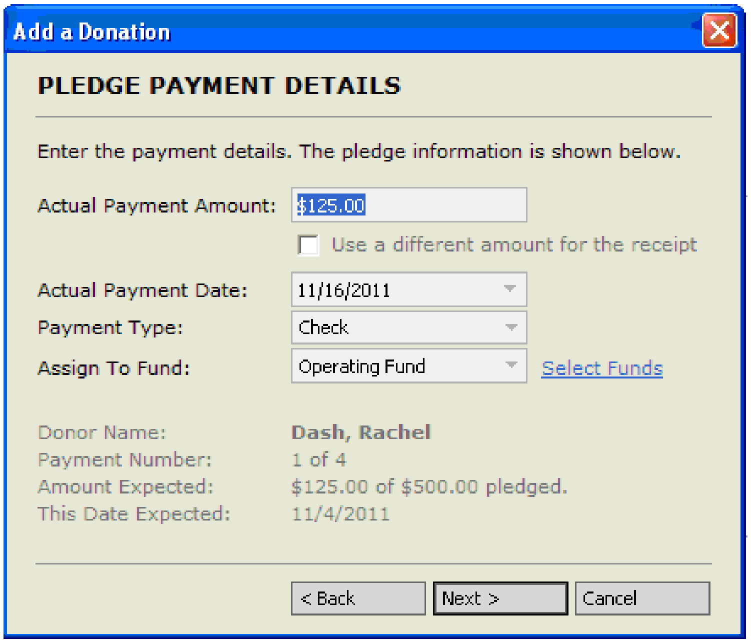
Applying a Payment to a Pledge

You must choose a pledge payment from a list of the donor's open pledges. Select the pledge to which the received payment applies and click **Next** to continue.



Entering Pledge Payment Details

This part of adding a pledge allows you to enter donation fund and payment details for your pledge payment.



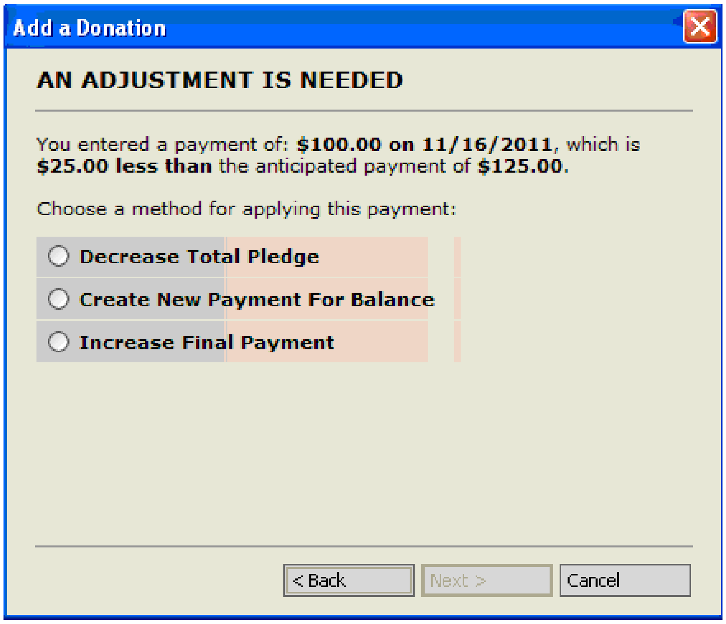
Actual Payment Date: You can change the date the payment was made if it differs from the scheduled due date.

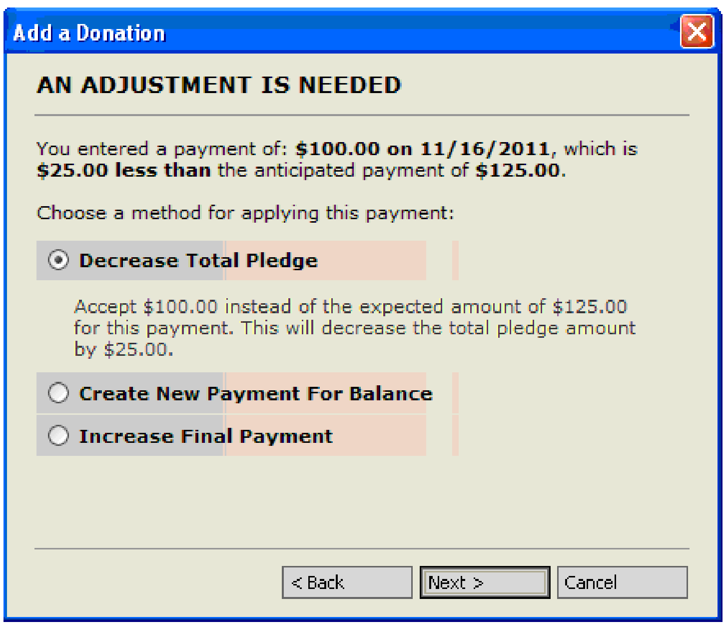
Assign to Fund (Directed Gifts): You can choose to assign the entire donation to one fund, or split it between multiple funds. Set up your own funds by going to Settings / Accounting / Manage Accounts and Funds

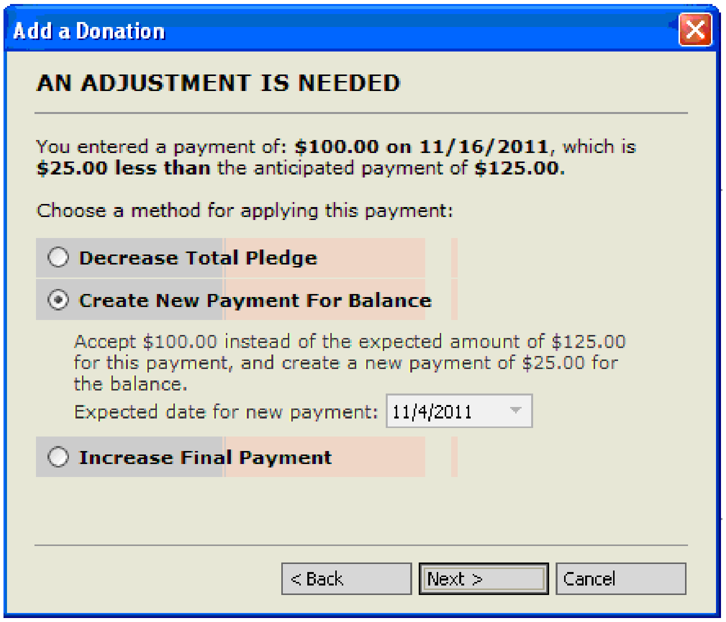
To direct a payment to multiple funds, click the **Select Funds** link beside the **Assign To Fund** field. Click the checkbox in the **Include** column beside each fund to which you want to assign a portion of the fund. Assign a specific amount to each of those funds by clicking the box in the **Amount** column next to the fund and entering the desired amount. Summary information is included at the bottom of the window, showing the unassigned donation amount. This ensures that you allocate the correct total amount.

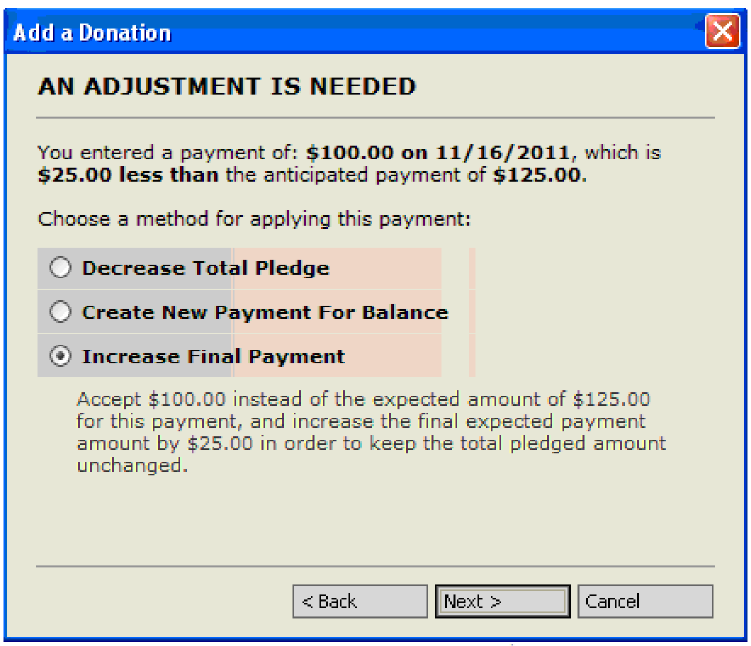
Actual Payment Amount: You can indicate if the donor is making a payment amount that is different from the amount anticipated. Note that you can use a different amount for your donation receipt by clicking the checkbox provided
If applying a payment amount that is different from the anticipated payment, an adjustment page will appear after you click **Next**. GiftWorks gives different options for an adjustment depending on the amount of the payment relative to the expected amount.

If the payment amount is less than expected you will see the following options:

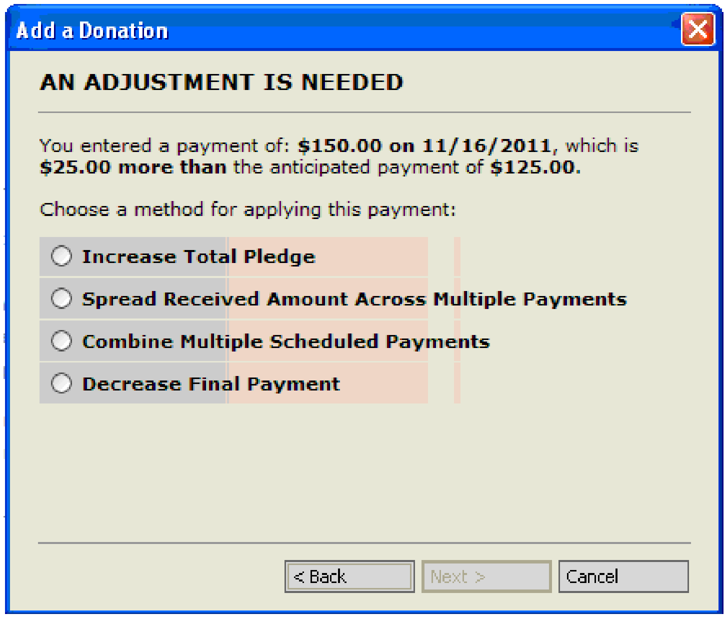

Add a Donation
AN ADJUSTMENT IS NEEDED
You entered a payment of: $100.00 on 11/16/2011, which is
$25.00 less than the anticipated payment of $125.00.
Choose a method for applying this payment:
Decrease Total Pledge
Create New Payment For Balance
Increase Final Payment
< Back
Next >
Cancel

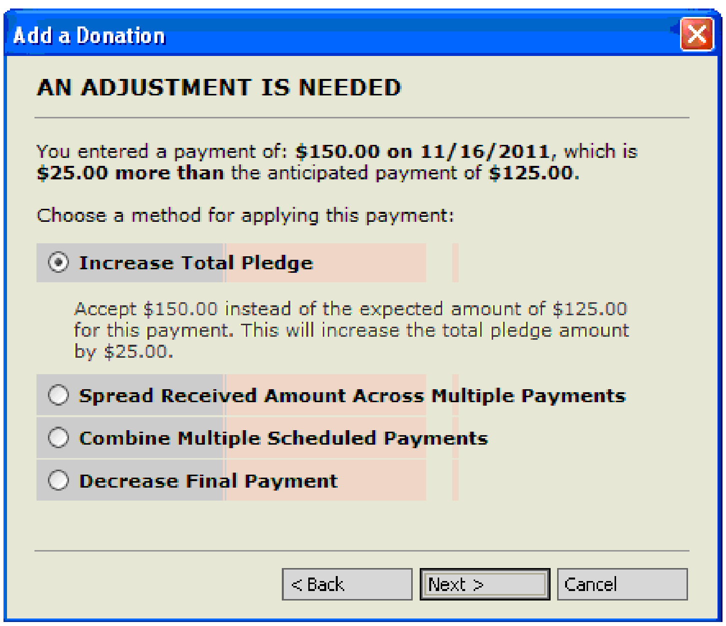

Add a Donation
AN ADJUSTMENT IS NEEDED
You entered a payment of: $100.00 on 11/16/2011, which is
$25.00 less than the anticipated payment of $125.00.
Choose a method for applying this payment:
Decrease Total Pledge
Accept $100.00 instead of the expected amount of $125.00
for this payment. This will decrease the total pledge amount
by $25.00.
Create New Payment For Balance
Increase Final Payment
< Back
Next >
Cancel

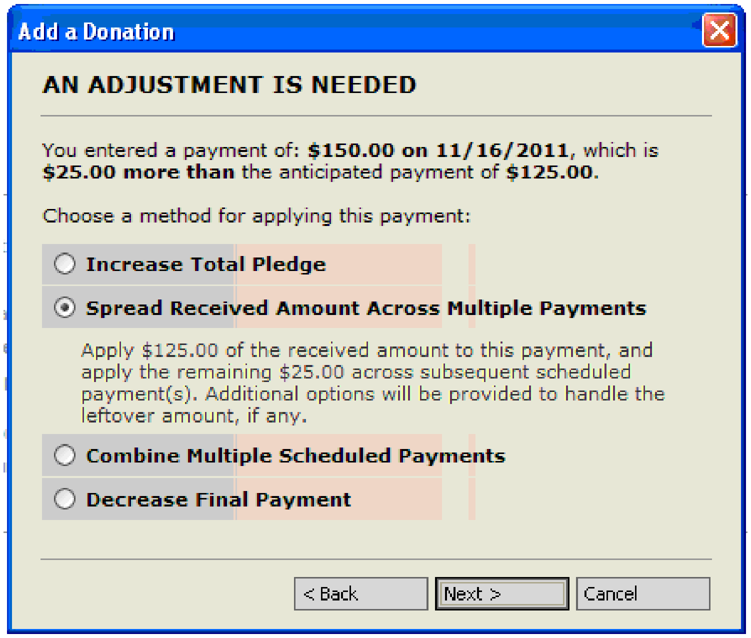

Add a Donation
AN ADJUSTMENT IS NEEDED
You entered a payment of: $100.00 on 11/16/2011, which is $25.00 less than the anticipated payment of $125.00.
Choose a method for applying this payment:
Decrease Total Pledge
Create New Payment For Balance
Accept $100.00 instead of the expected amount of $125.00 for this payment, and create a new payment of $25.00 for the balance.
Expected date for new payment: 11/4/2011
Increase Final Payment
< Back
Next >
Cancel

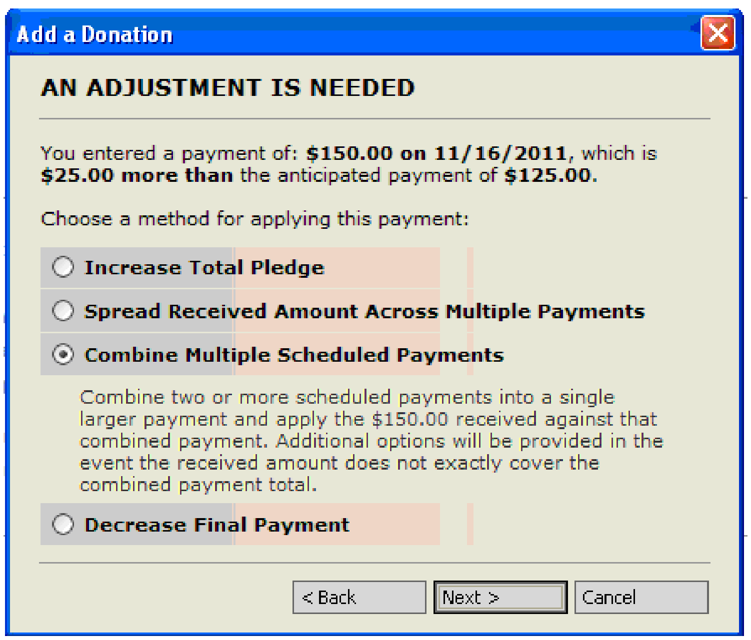

Add a Donation
AN ADJUSTMENT IS NEEDED
You entered a payment of: $100.00 on 11/16/2011, which is $25.00 less than the anticipated payment of $125.00.
Choose a method for applying this payment:
Decrease Total Pledge
Create New Payment For Balance
Increase Final Payment
Accept $100.00 instead of the expected amount of $125.00 for this payment, and increase the final expected payment amount by $25.00 in order to keep the total pledged amount unchanged.
< Back
Next >
Cancel

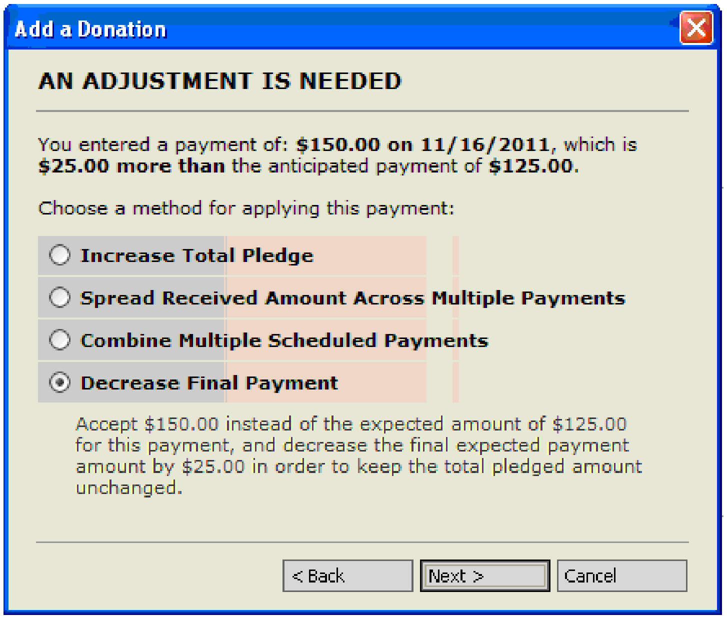
If the payment amount is more than expected you will see the following options:






Add a Donation
AN ADJUSTMENT IS NEEDED
You entered a payment of: $150.00 on 11/16/2011, which is $25.00 more than the anticipated payment of $125.00.
Choose a method for applying this payment:
Increase Total Pledge
Spread Received Amount Across Multiple Payments
Apply $125.00 of the received amount to this payment, and apply the remaining $25.00 across subsequent scheduled payment(s). Additional options will be provided to handle the leftover amount, if any.
Combine Multiple Scheduled Payments
Decrease Final Payment
< Back
Next >
Cancel

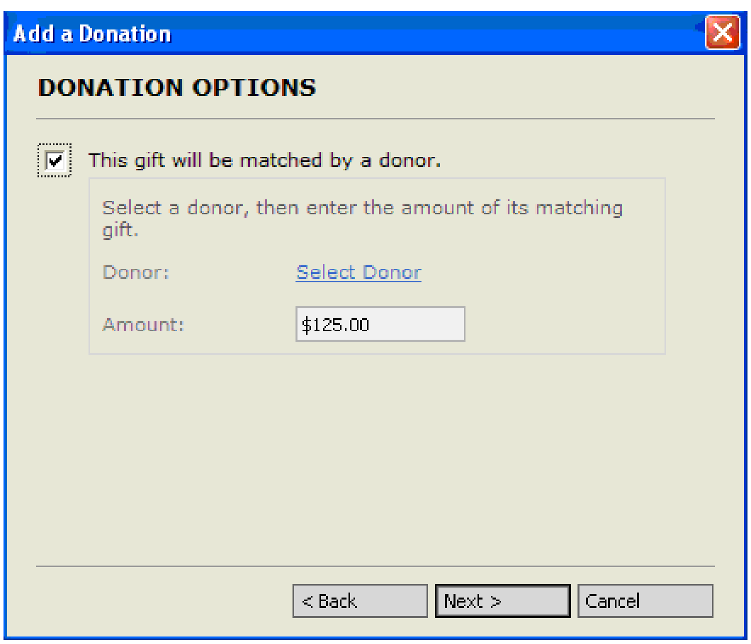

Add a Donation
AN ADJUSTMENT IS NEEDED
You entered a payment of: $150.00 on 11/16/2011, which is $25.00 more than the anticipated payment of $125.00.
Choose a method for applying this payment:
Increase Total Pledge
Spread Received Amount Across Multiple Payments
Combine Multiple Scheduled Payments
Combine two or more scheduled payments into a single larger payment and apply the $150.00 received against that combined payment. Additional options will be provided in the event the received amount does not exactly cover the combined payment total.
Decrease Final Payment
< Back
Next >
Cancel



Payment Type: Select the payment type for the donation. Default payment types include money, in-kind contributions, and securities.

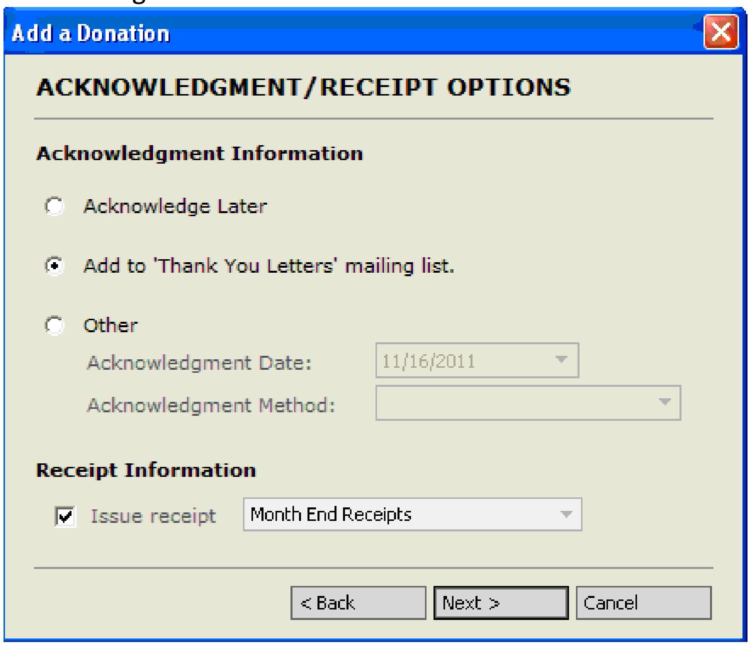
If you select a payment type other than cash, a Payment Detail page with additional fields will appear. Enter the details about the payment. For example, for donations made in the form of equipment you can enter a description of the equipment, the manufacturer, the model, serial number, and condition of the equipment.

Specifying Donation Options
This step of the process lets you choose to match the gift by another donor, if applicable.



Acknowledgment / Receipting Pledges

You can choose a method to thank the donor for the pledge payment. Click the desired acknowledgment method and click **Next** to continue.



Acknowledge Later: If you choose to acknowledge later, you will be able to choose a method of acknowledgment for the donation later.

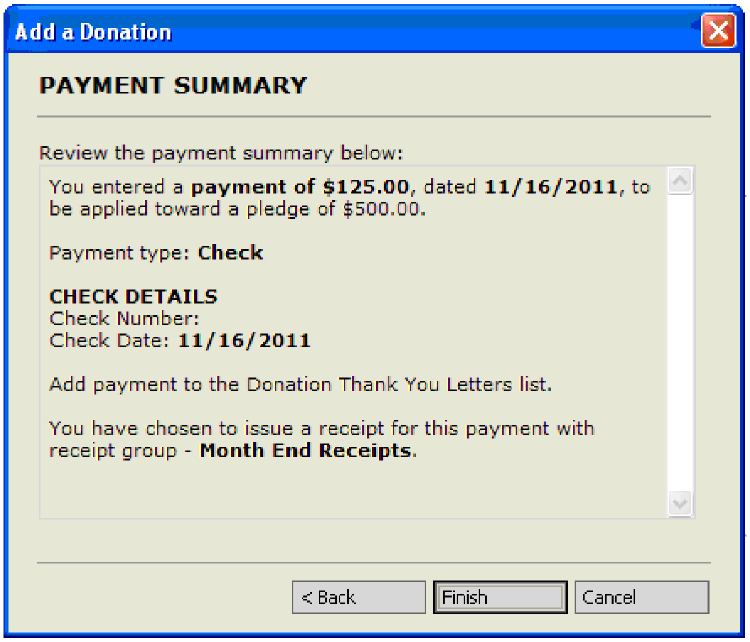
Add to "Thank You Letters" mailing list: Choosing this option adds the donation to the "Donation Thank You Letters" mailing. Simply go to the Mailings section of GiftWorks and proceed with the donation mailing process to send the letter. If you choose this option, the donation can automatically be set as "Acknowledged" once the mailing has been completed.

Other: This option lets you choose a method of acknowledgment not related to mailing. You can select from four other methods, including phone call, thank you note, in person, and thank you gift, or enter your own information for how the gift was acknowledged. Indicate the date of the acknowledgment using the date field provided.

Receipt Information: Choose whether or not you want to issue a Receipt for this pledge payment. If so, choose the Receipt Group to add the pledge payment to.

Confirming Payment Summary

After entering a pledge payment, there is a summary of the pledge payment information you have entered. Click **Finish** to confirm the summary information and complete the payment.



Applying Soft-Credit to a Pledge Payment: You must first apply the pledge payment and then "edit:" the Payment in order to apply the Soft-Credit. Then follow same steps to apply Soft-Credit for a donation.

VIEWING AND EDITING DONATIONS AND PLEDGES

There are a number of options for viewing and editing your donations and pledges. The items listed below offer detail about all of your options.

Viewing the Main Donations Page

When you click the Donations icon at the top of GiftWorks, you will see either the Donations Overview or the Donations Dashboard, depending on which you have chosen. To change this option:

- If you see the Donations Overview, you can click the **Skip this screen…** checkbox. The next time you click the Donations icon at the top, you will be taken to the Donations Dashboard.
- If you see the Donations Dashboard, click Show Donations Overview in the Other Tasks menu, then click the **Skip this screen…** checkbox to uncheck it. The next time you click on the Donations icon at the top, you will be taken to the Donations Overview.

On the Donations Dashboard, you can choose from a variety of views to get a quick glance at the donations and pledge information you want. Click the arrow next to the "view" name to make your selection. Each view shows the donor name, campaign allocation, and fund for each donation or pledge. Additional columns vary by view. You can sort your view by clicking the column headings.

VIEW LATEST DONATIONS Print

Date	Donation Type	Amount	Donor	Campaign	Fund
3/4/2008	Pledge Payment	$100.00	Wagenstall, Ralph T	Annual Campaign…	General Fund
2/26/2008	Gift	$100.00	Lynn, Marcus & Bridgett	Annual Campaign…	
12/21/2007	Gift	$200.00	Houston, Paul	Annual Campaign…	General Fund
12/21/2007	Pledge Payment	$200.00	Cresta Corporation	Annual Campaign…	General Fund
12/21/2007	Gift	$600.00	Van Hooven, Jason	Annual Campaign…	General Fund
12/21/2007	Pledge Payment	$600.00	Save Our Families Foundation	Annual Campaign…	General Fund
12/21/2007	Pledge Payment	$2,000.00	Horne, Carl	Campaign for Ca…	General Fund
12/21/2007	Pledge Payment	$2,000.00	Horne, Carl	Campaign for Ca…	General Fund
12/21/2007	Pledge Payment	$2,000.00	Horne, Carl	Campaign for Ca…	General Fund
12/20/2007	Gift	$100.00	Tyler, Shawn	Annual Campaign…	Family Counseling Fund
12/20/2007	Gift	$200.00	Arm, Mark	Annual Campaign…	General Fund
12/20/2007	Gift	$600.00	Saunders, Gretchen	Annual Campaign…	General Fund
12/20/2007	Gift	$800.00	Mills, Jennifer	Annual Campaign…	Family Counseling Fund
12/19/2007	Gift	$2,000.00	Feed The Nations	Annual Campaign…	Building Fund
12/19/2007	Gift	$3,000.00	Taylor Foundation	Technology Cam…	Family Counseling Fund
12/18/2007	Gift	$250.00	Houston, Paul	Technology Cam…	Technology Fund
12/8/2007	Gift	$3,000.00	Tipton, Lynn	Friends of the Fa…	Family Counseling Fund
12/1/2007	Gift	$50.00	Aliota, Mark	Annual Campaign…	General Fund
11/14/2007	Gift	$5,000.00	Night, Casandra	Campaign for Ca…	Building Fund
11/13/2007	Gift	$125.00	Barber, Harry	Annual Campaign…	General Fund

Total Donations: 20

Latest Donations: The last 20 gifts and pledge payments added to your database.

Top 10 Donations: The 10 largest donations made to your organization.

Latest Pledges: The last 20 pledges added to your database.

Upcoming Payments: The next 20 scheduled payments you are expecting to receive.

Overdue Payments: The list of expected pledge payments that are overdue.

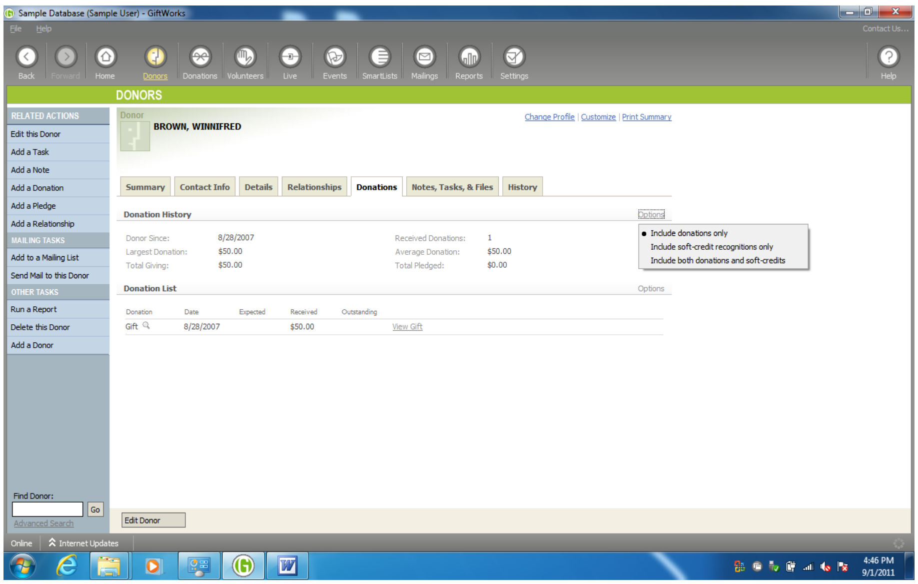
You can open an individual donation or pledge from any of these views by double-clicking the donation/pledge in your view.

Viewing a Donor's Donation Summary

You can view a summary of the pledges, pledge payments, and gifts by a donor when you view the donor. When viewing a donor, click the **Donations** tab at the top of the main work area.

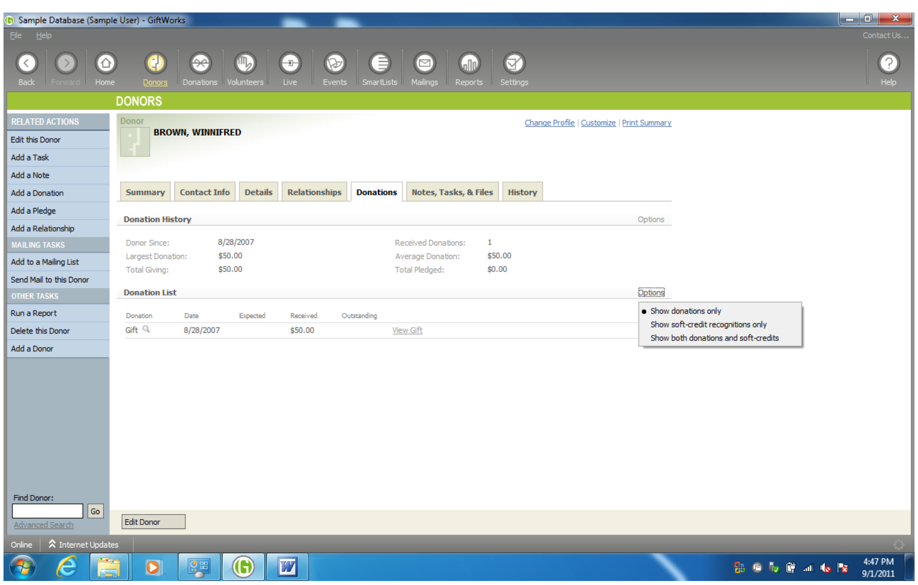
Donations Tab - Donation History: Options (This is PER GiftWorks USER)

Can choose to Include Donations Only, Include soft-credit recognitions only, or Include both donations and soft-credits



Donations Tab-Donation List: Options (This is PER GiftWorks USER)

Can choose to Include Donations Only, Include soft-credit recognitions only, or Include both donations and soft-credits

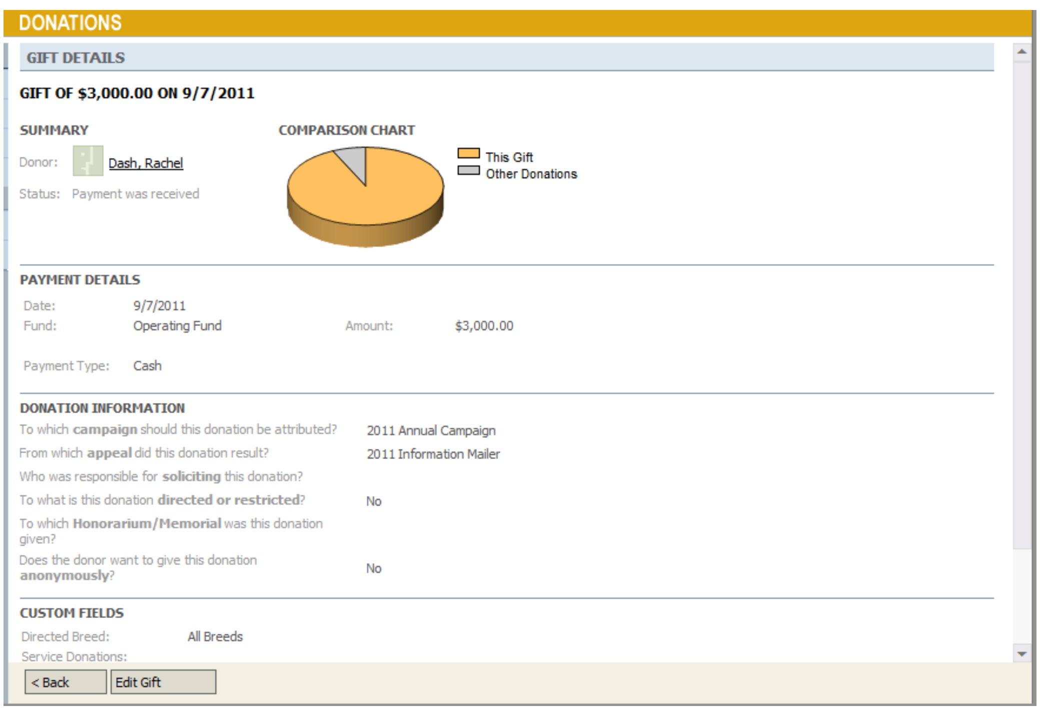


The top of this view provides a summary of the donor's donation and pledge history. You can see how long the donor has been a donor, the total amount pledged to your organization, the largest donation the donor has made to your organization, the total number of donations you have received from the donor, the total amount you have received from the donor, and the average donation amount.

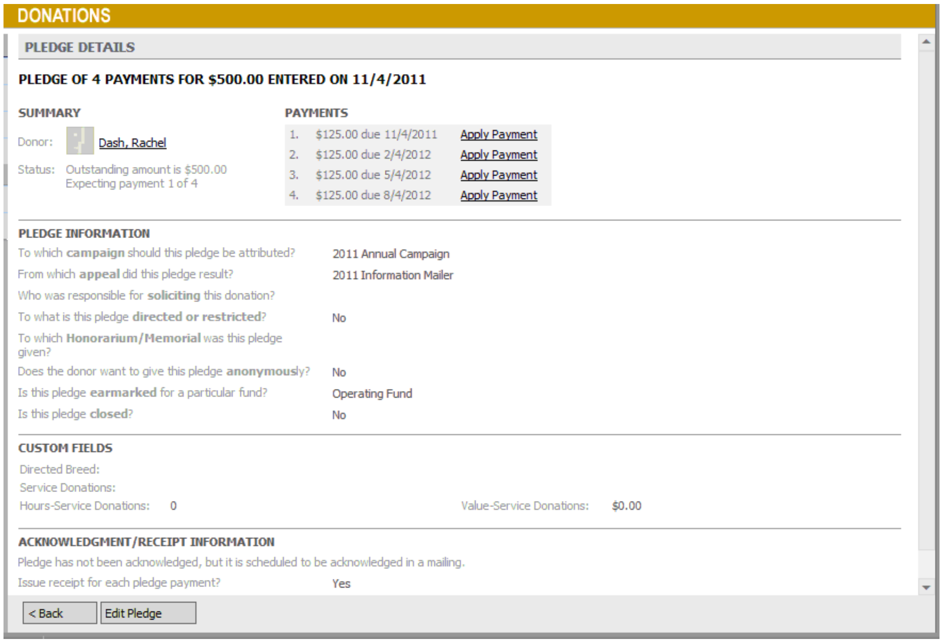
The bottom portion of this view lists all the donor's pledges and gifts to your organization. Pledges and gifts are distinguished by the Donation Type column, and the date that the donation was given is noted in the Date column. The Expected column will display the amount Expected for a Pledge or Pledge Payment. The Received column will display the amount that has been received for the donation or pledge payment. The Outstanding column will display the amount that has not yet been received on a pledge. The Household Member column displays the name of the Household member for whom that donation was entered for.

Pledges show the scheduled payment dates and the expected and received (if any) amounts for each payment. You can view the detailed individual donations and pledges by clicking the **View Gift or View Pledge** link beside the donation or pledge. From the Detail view, you can edit your donations and pledges.

Viewing Donations, Pledges, and Pledge Payments
You can open a view of your individual donations, pledges, and pledge payments in a couple of ways. Double-click a donation or payment to view its details. Otherwise, when viewing a donor, click the **Donations** tab, and click through to the donation or pledge.



Viewing a Pledge
A Pledge is divided into four sections. You can edit the pledge by clicking **Edit Pledge** at the bottom of the main work area.



Summary and Payments: The summary information on a pledge includes a link to the corresponding donor and the current status of expected payments on the pledge. The payments information lists the schedule of pledge payments for the pledge, including the expected date of payment and the amount that you expect to receive. Additionally, you can view individual pledge payments for each fulfilled payment by clicking its link or apply payments to the pledge by clicking **Apply Payment** beside the appropriate scheduled payment.

Pledge Information: Pledge information shows the details of your pledge, including fund allocation, campaign and appeal attribution, donor anonymity, pledge status, honorarium and memorial information, and more.

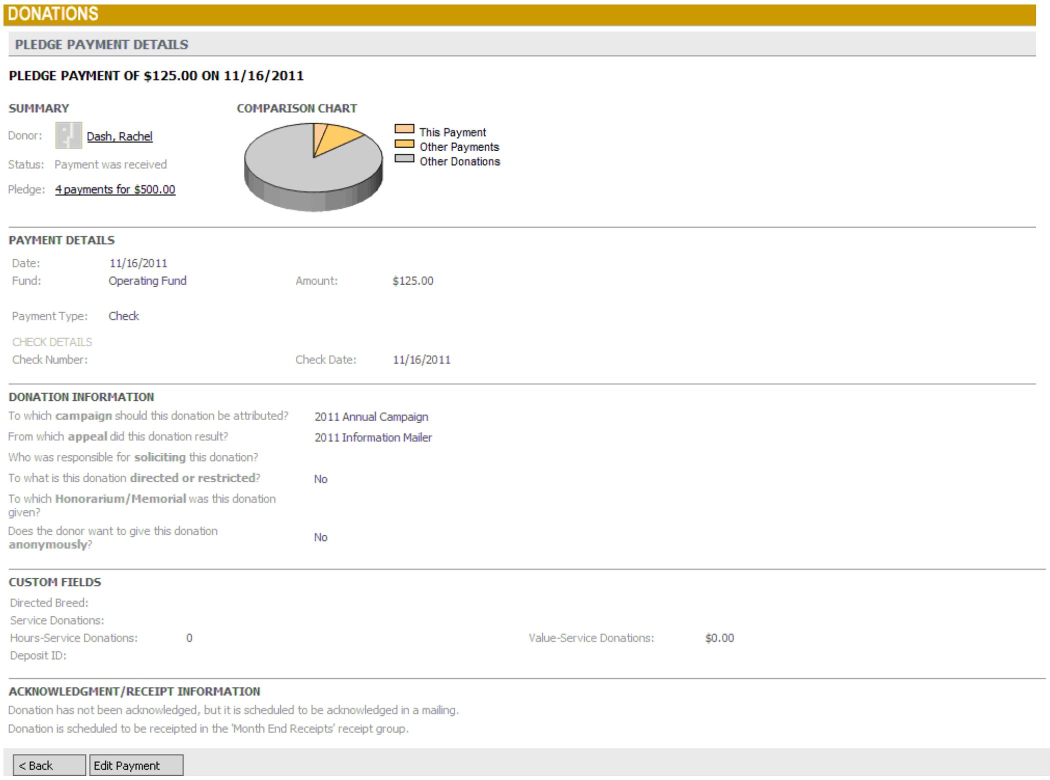
Custom Fields: This section contains the custom donation fields that you added in the Settings section.

Acknowledgment/Receipt Information:: This section details the acknowledgment method you chose for the pledge and the current status of that acknowledgment. If you have not acknowledged the pledge, you can do so by clicking the **Acknowledge Now** link. This section also shows you the Receipt option you have chosen.

Viewing a Pledge Payment

View a pledge payment by first opening the pledge to which the payment applies.

Next, click on the pledge payment's link located at the top of the main work area in the Payments section. A pledge payment is divided into five sections. You can edit the payment in the same ways that you edit a gift/donation—by clicking **Edit Payment** at the bottom of the main work area



Summary and Comparison Chart: The summary information includes a link to the corresponding donor and a link to the corresponding pledge. The current status of the payment is also shown. The comparison pie chart provides a visual that indicates the monetary significance of the payment against all other donations and payments made by the donor.

Payment Details: This section shows the date that the payment was applied to its pledge, the fund to which the payment is applied, the payment type, and the payment amount.

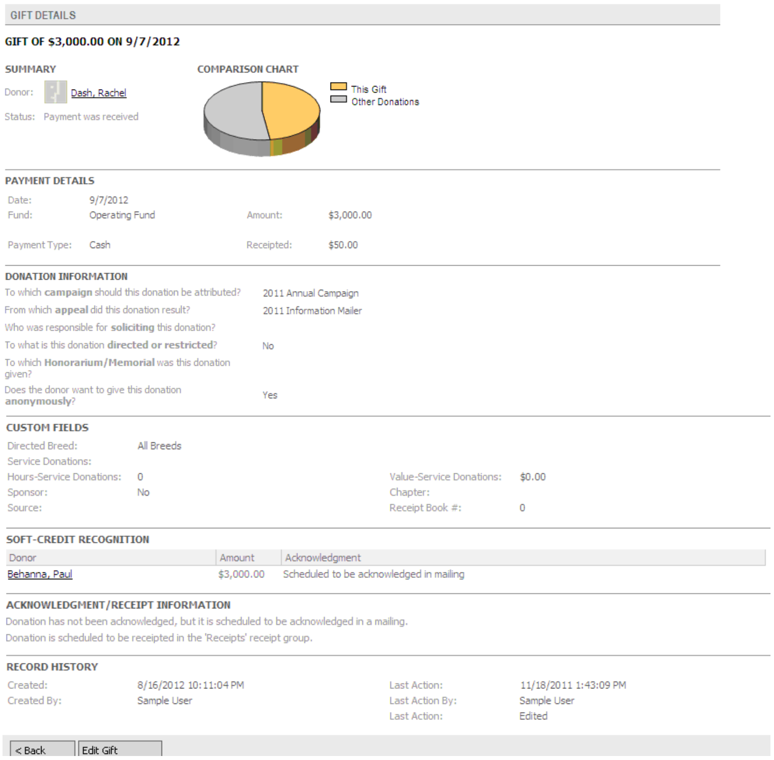
Donation Information: Donation information shows the defined details of your payment, including campaign and appeal attribution, donor anonymity, solicitor, honorarium and memorial information, and more.

Custom Fields: This section contains the custom donation fields that you added in the Settings section.

Acknowledgment / Receipt Information:: This section details the acknowledgment method you chose for the pledge payment and the current status of that acknowledgment. It also shows the receipt status for the payment. If you have not acknowledged the payment, you can do so by clicking the **Acknowledge Now** link.

Viewing a Donation/Gift

A Donation is divided into four sections. You can edit the donation by clicking **Edit Gift** at the bottom of the main work area.



Summary and Comparison Chart: The summary information for the donation includes a link to the corresponding donor and the current payment status. The comparison pie chart provides a visual that indicates the monetary significance of the gift against all other donations and payments made by the donor.

Payment Details: This section shows the date the payment donation was made, the fund to which the payment is applied, the payment type and the payment amount.

Donation Information: Donation information shows the defined details of your gift, including campaign and appeal attribution, donor anonymity, solicitor, honorarium and memorial information, and more.

Custom Fields: This section contains the custom donation fields that you added in the Settings section.

Soft-Credit Recognition: This section details Soft credit donation recognition information.

Acknowledgment / Receipt Information: This section details the acknowledgment method you chose for the donation and the current status of that acknowledgment. It also shows the receipt status for the donation. If you have not acknowledged the gift, you can do so by clicking the **Acknowledge Now** link.

GIFTWORKS HONORARIA AND MEMORIALS OVERVIEW

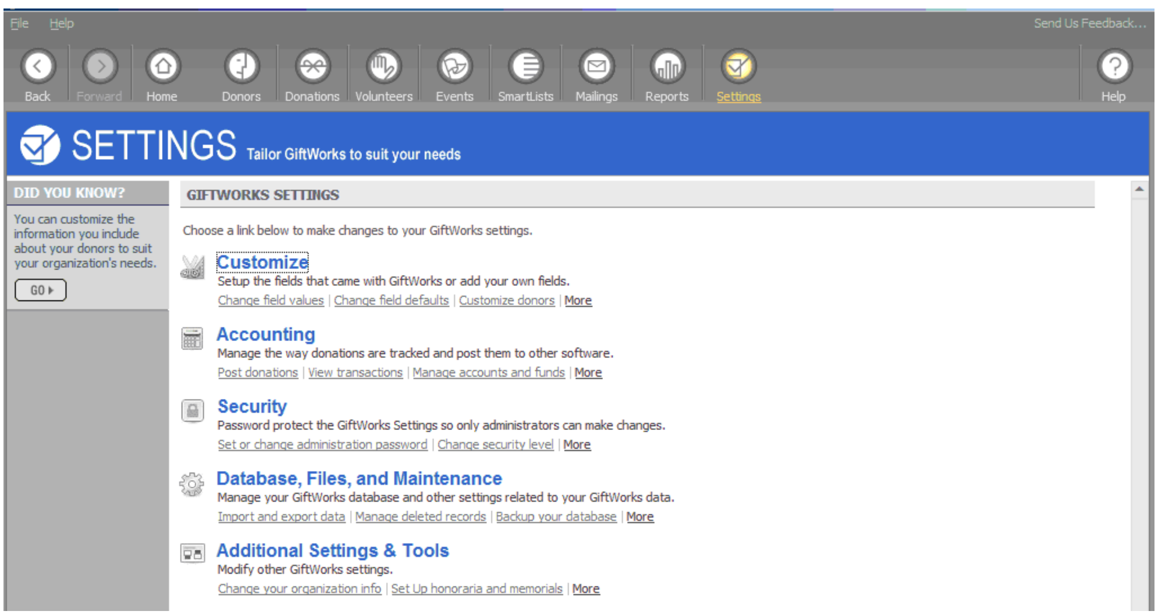
From time to time, people may make donations to your organization in honor or in memory of someone or something. GiftWorks helps you distinguish donations like these from other donations with honorarium and memorial options. GiftWorks makes honoraria and memorials a standard part of donation tracking.

When you add honoraria and memorials to your GiftWorks database, you can record a donation as a gift given in honor or in memory of someone. Each time an honorarium or memorial is accredited with a donation or pledge, you can acknowledge the donor and notify donors associated with the honorarium or memorial (for example family members).

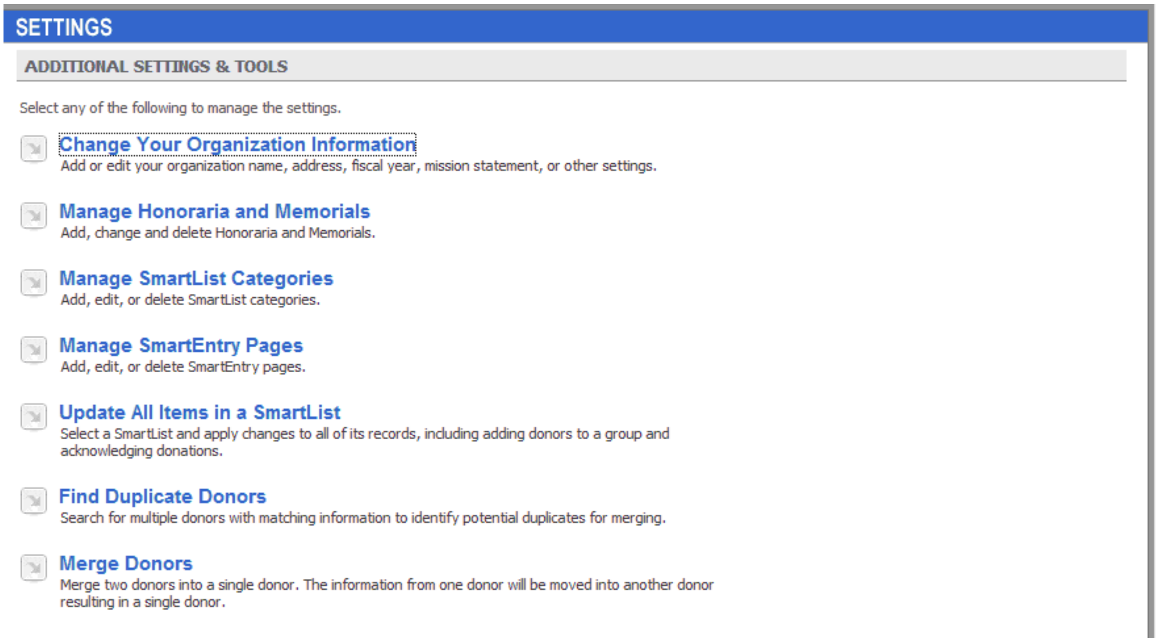
The items listed below show you how to create, edit, and delete honoraria and memorials. They also show you how to add a donation made in honor or in memory of someone, how to acknowledge the donation, and how to notify necessary donors of the donation.

CREATING, EDITING, AND DELETING HONORARIA AND MEMORIALS

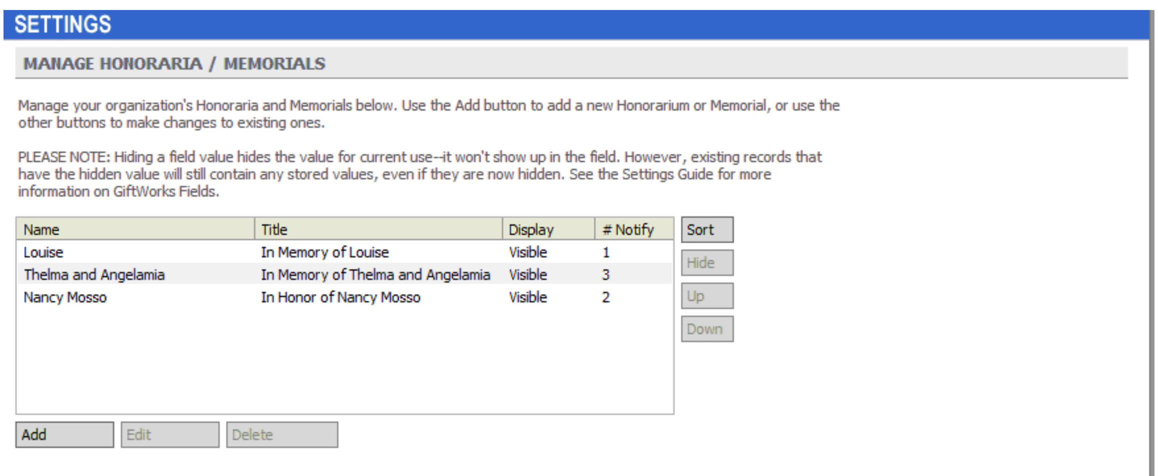
To add a donation given in honor or in memory of someone, you can either add an honorarium or memorial in the **Settings** area or add an honorarium or memorial as you enter the donation. To do this in **Settings**, click the **Settings** icon at the top of your screen, then click the **Additional Settings & Tools** link in the main work area.



Next, click the **Manage Honoraria and Memorials** link in the main work area



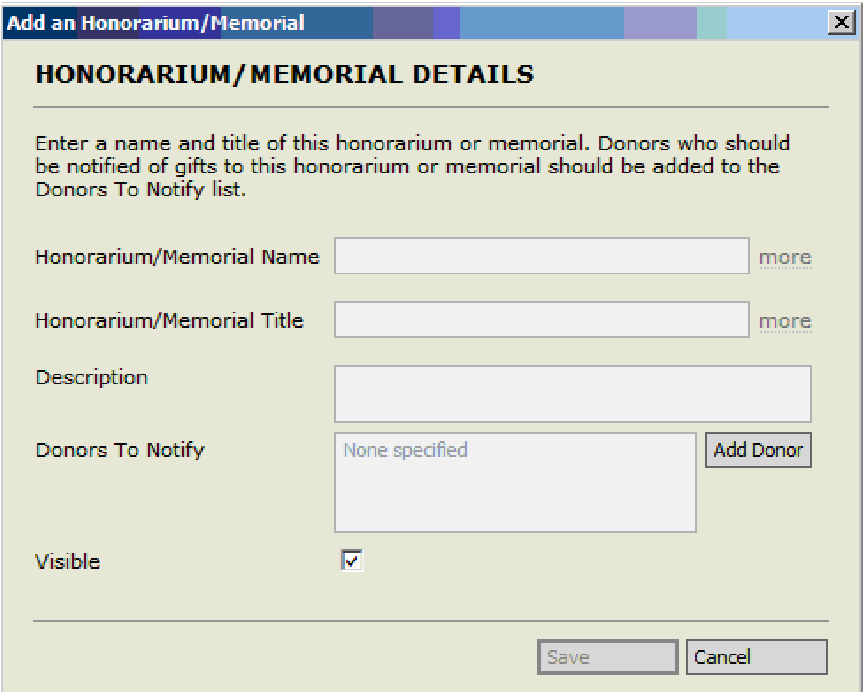
The resulting screen offers a view of all honoraria and memorials you have created. The view includes the name, title and description of each honorarium and memorial, the display status of each record, and a count of donors that should be notified each time a donation is accredited to the honorarium or memorial. The display column indicates if that honorarium or memorial is visible or hidden from the selection box that appears each time you add a donation.



From this view, you have the ability to add new honoraria and memorials, show or hide the memorials or honoraria.

Adding Honoraria and Memorials

To add a new honorarium or memorial, click **Add** in the main work area of the Manage Honoraria and Memorials screen.



In the window that appears, assign a name, title and description to your honorarium or memorial. Note that the title should begin with "In honor of" or "In memory of." This ensures that the information for you honorarium or memorial merges seamlessly into your honorarium or memorial letter templates.

You can enter a brief description in the description box.

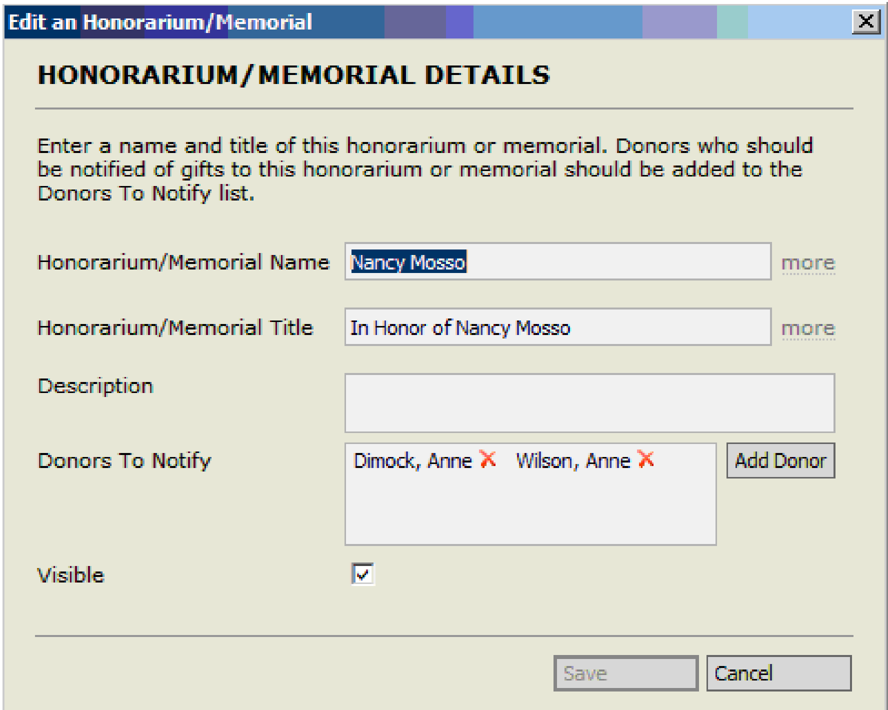
At the bottom of the window, you can add donors to the notification list. Each time a donation is accredited to the honorarium or memorial, these donors will be queued for notification. Click **Add Donor**, and using the search field provided, find or select a donor from your GiftWorks database or add a new donor.

You can also remove donors (if any) from the notification list by clicking the red **X** beside their names.

Click the checkbox beside **Visible** in the Add an Honorarium/Memorial window to indicate that you want to be able to choose the honorarium or memorial when you add new donations.

When you are finished, click **Save**.

Editing Honoraria and Memorials
When editing an honorarium or memorial, you can change its name, title and description, add or remove donors for notification, and hide or show the record when new donations are being added. To edit an honorarium or memorial, click the record you want to change and then click **Edit**.



Change the existing name, title or description by typing in the appropriate text boxes.

Add new donors to the notification list by clicking **Add Donor**.

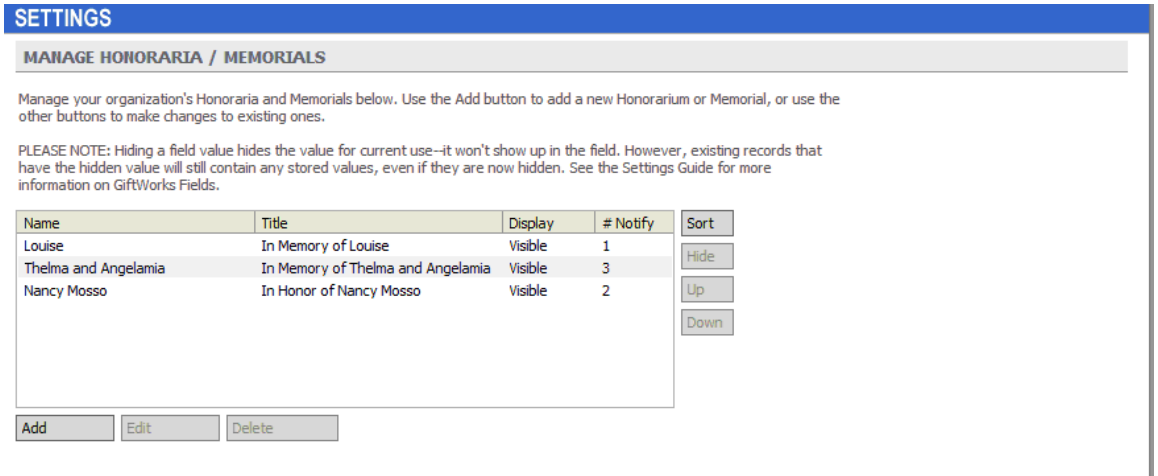
Remove a donor from the notification list by clicking the red **X** beside the donor name.

Change the record's display status for new donations added in honor or in memory of someone by clicking the checkbox beside Visible.

Once you have made your changes, click **Save**.

Deleting Honoraria and Memorials

To delete an honorarium or memorial, click the desired record title, then click **Delete**.



Hiding Honoraria and Memorials

The Display column in your Honoraria/Memorials view indicates the current display status for your records. Visible records can be selected each time you indicate that a new donation is given in honor or in memory of someone. Hidden records are not available in the selection box.

To hide a record that is currently visible, click the record and then click **Hide** on the right side of your screen. To show a record that is currently hidden, click the record and then click **Show** on the right side of your screen.

Sorting Your View of Honoraria and Memorials

You can move an individual record in your view up or down by clicking on the record and clicking **Up** or **Down** on the right side of your screen. Sort the records by title by clicking the **Sort** button. Clicking **Sort** again will sort them in reverse order by title.

ACCREDITING NEW DONATIONS OR PLEDGES TO HONORARIA AND MEMORIALS

In the Add a Donation/Add a Pledge process, you can specify if the new donation or pledge is given in honor or in memory of someone. GiftWorks will log this information in the donation or pledge record. Accrediting an honorarium or memorial allows you to thank the donor as well as notify the donors associated with the honorarium or memorial.

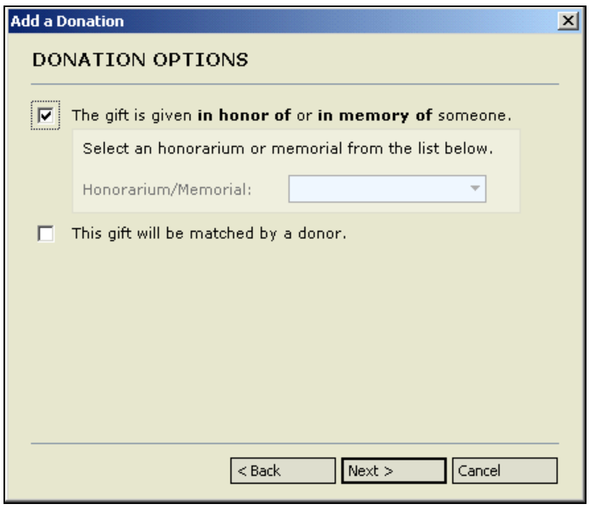
To add a donation or pledge made in honor or in memory of someone, you can either add an honorarium or memorial in the **Settings** area or add an honorarium or memorial as you enter the donation. To do this in **Settings,** refer to the Creating, Editing, and Deleting Honoraria and Memorials section of this guide.

Adding a Donation in Honor of/In Memory of

Click **Add a Donation** in the **Related Actions** menu on the left side of your screen.

In the window that appears, proceed with adding the donation as normal. This includes indicating the donor of the donation, the donation type, the fund the donation will be assigned to, the gift amount, and the payment type. Click **Next** after each step of the donation process.

When the Donation Options section appears, click the checkbox beside “This gift is given **in honor of** or **in memory of** someone.” From the selection box that appears, choose the existing honorarium or memorial toward which the donation is made *or* click on the ‘--Add New Honorarium/Memorial--’ option at the bottom of list and add the new honorarium/memorial. You can also indicate that the gift will be matched if that applies. Click **Next** to continue through the process and complete adding the donation.



Adding a Pledge in Honor of/In Memory of
Click **Add a Pledge** in the **Related Actions** menu on the left side of your screen.

In the window that appears, proceed with adding the pledge as normal. This includes indicating the donor of the donation, the pledge date, amount, number of payments, schedule, and acknowledgment information. Click **Next** after each step of the pledge process.

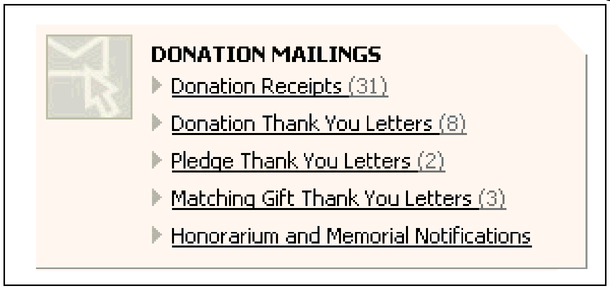
When you get to the main Add a Pledge screen, go to the Pledge Information area and choose the existing honorarium or memorial toward which the pledge is made *or* click on the ‘--Add New Honorarium/Memorial--’ option at the bottom of list and add the new honorarium/memorial.
When you are done making modifications to the pledge, click **Save** at the bottom of the main work area to commit your changes.

Acknowledging and Receipting Honorarium and Memorial Donations
Regular donations and donations given in honor or in memory of someone are each acknowledged and receipted in the same way.

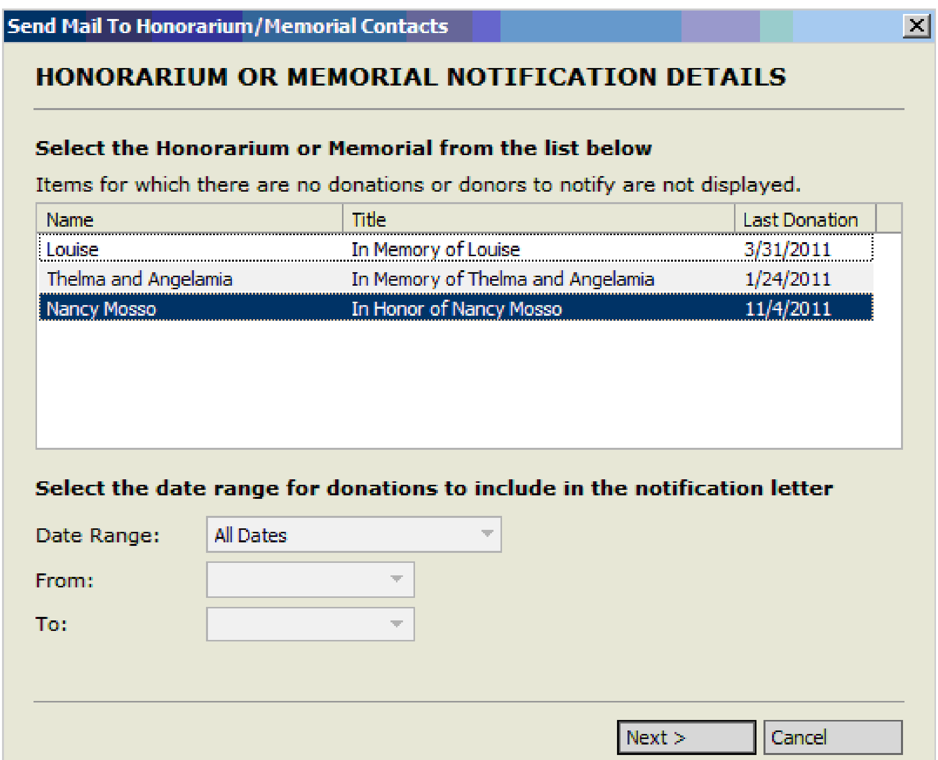
Sending Honorarium and Memorial Notifications
GiftWorks provides two built-in letter templates for honorarium and memorial notification. These templates can be used to inform donors associated with the honorarium or memorial of all donations made towards it.

Identify these donors when you set up the Honorarium/Memorial under the Donors to Notify list. Refer to the Edit Honoraria/Memorials section for details on adding or removing donors from the notification list. The donors included in this list are automatically added to the Honorarium and Memorial Notifications mailing each time you add a donation to their corresponding honorarium or memorial.

To send notifications, click the **Mailings** icon at the top of your screen. Then click the **Honorarium and Memorial Notifications** link in the donation mailings section.



Next, click the honorarium or memorial you want to send notification to and select the Date Range you would like to use



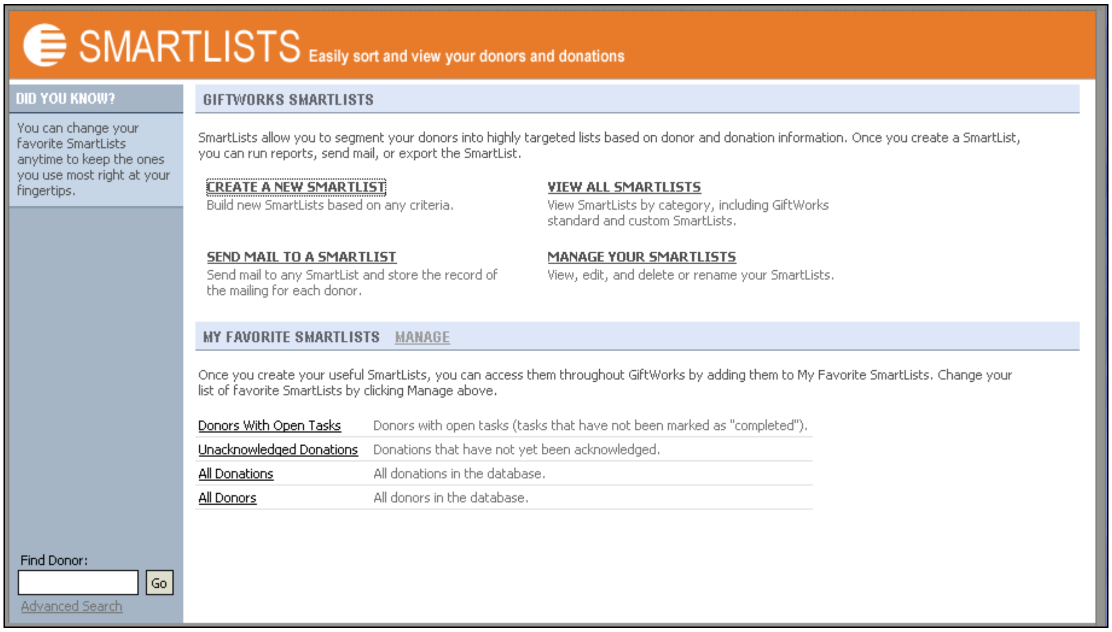
Proceed with the normal mailing process.

SMARTLISTS

IN THIS SECTION

SMARTLISTS OVERVIEW

The most important thing about the information you have in GiftWorks is the ability to analyze it, understand it, and act on it.



Even if you have hundreds or thousands of donors, SmartLists let you choose sets of criteria and then see which donors or donations meet those criteria at any given time. You can use SmartLists to generate reports, send mailings, create call lists, and more. You can even update all donors or donations in a SmartList at one time.

Creating a SmartList may at first seem somewhat daunting, but GiftWorks makes it relatively simple. Once you've made a few SmartLists, you'll see how simple and powerful SmartLists really are.

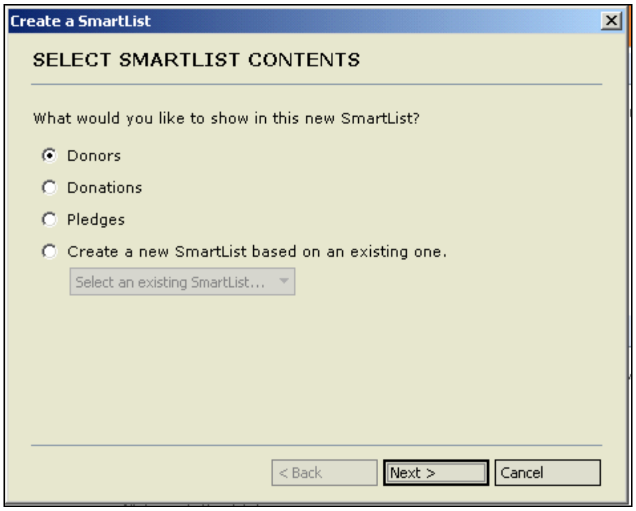
USING THE BUILT-IN SMARTLISTS

GiftWorks includes a number of built-in SmartLists. Almost any time you view a list of donors, donations, or pledges, you're looking at a SmartList. In fact, the "All Donors SmartList" is really just a SmartList of donors with a creation date of "All Dates."

You can see this by creating a copy of the All Donors SmartList:

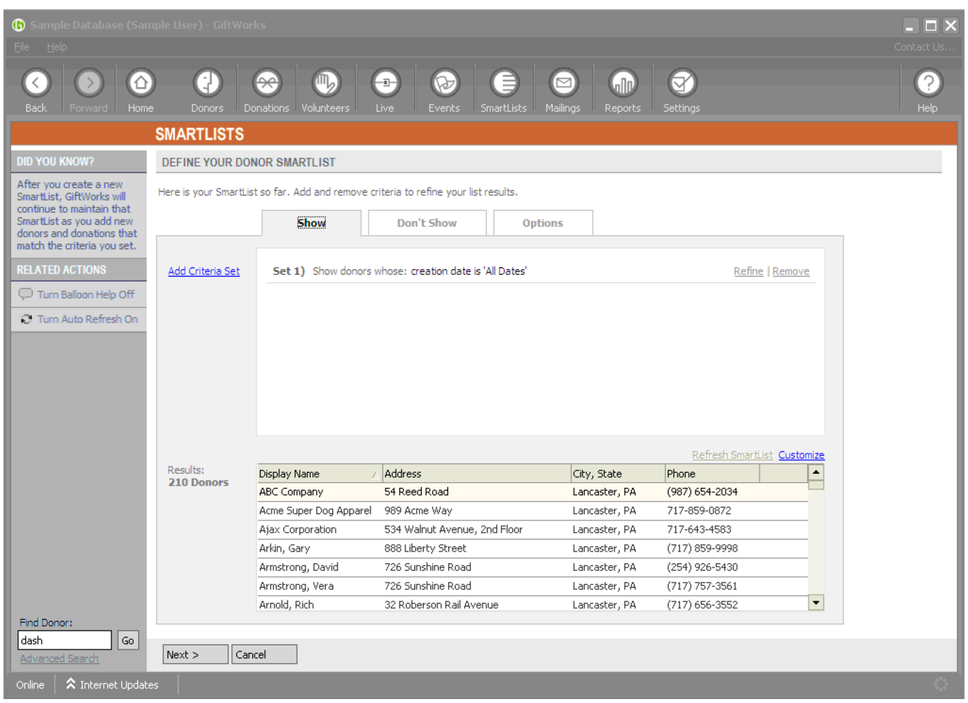
1. Click **SmartLists** at the top of GiftWorks.
2. Click **Create a New SmartList**.

3. Click **Create a new SmartList based on an existing one**, then select **All Donors** from the drop-down list.



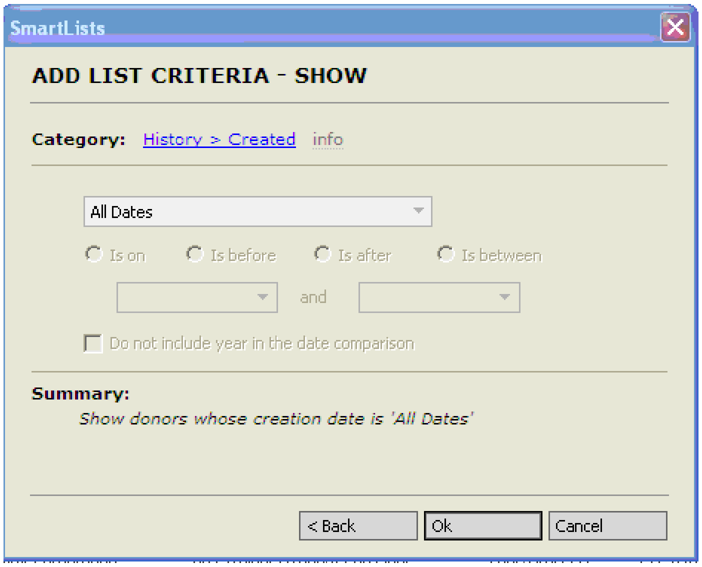
4. Click **Next**, and you will be taken to the SmartList definition screen.

Near the top of the main work area, you'll see the only criteria set for this SmartList (Show donors whose: creation date is 'All Dates'). In the Results preview in the bottom half of the work area, you'll see donors that meet the criteria. To see only donors created within the last six months, click **Refine** to the right of the criteria set.

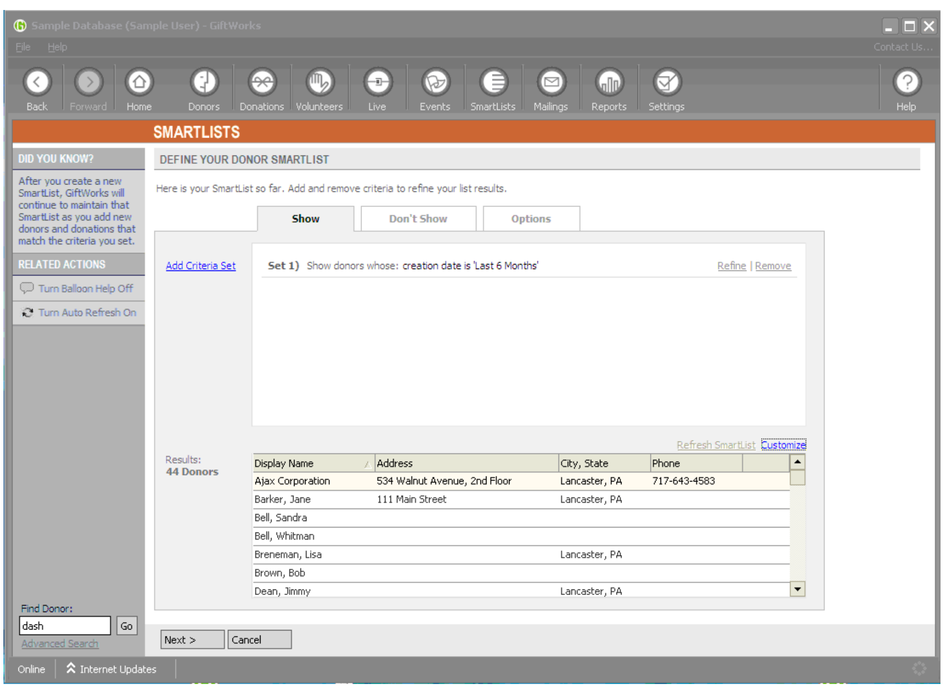


Next, click the linked criteria **creation date is 'All Dates'**.

This shows the currently selected criteria. If you click the drop-down (where **All Dates** is currently selected), you'll see all available date options, including **Last 6 months**. Select **Last 6 months**, click **OK**, then click **Done**. This takes you back to the main SmartList definition screen.



The criteria you changed is visible near the top: **Show donors whose: creation date is 'Last 6 months'**. On the bottom half, where the results are listed, you'll now see the donors created in the last six months. If you were to save this SmartList, the "Last 6 months" date range would be saved with the SmartList.



To see how to build a SmartList from scratch, see [Creating a SmartList](#).

UNDERSTANDING SMARTLIST TYPES

When creating a SmartList, you'll usually begin with a need such as: "I need to see all donations from board members last year," or "I want to invite everyone in a certain area to a special event." SmartLists make it easy to capture this sort of information.

There are three types of SmartLists: donors, donations, and pledges.

A **Donors SmartList** is one where the result is a list of donors. Each donor shows up in the list only once, even if they meet multiple criteria.

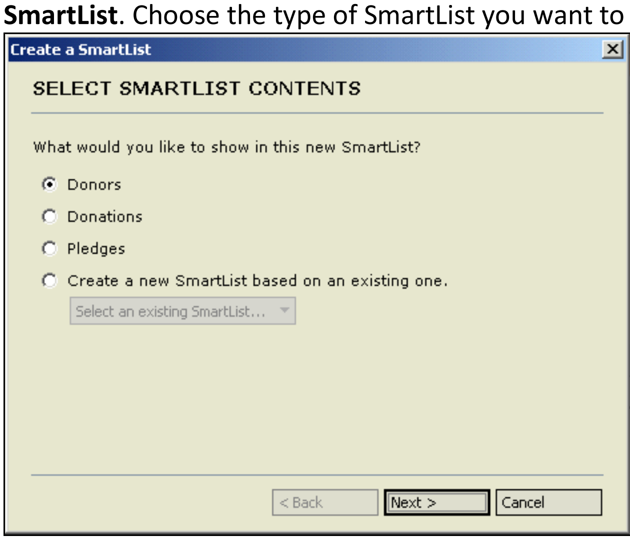
A **Donations SmartList** is one where the result is a list of donations (gifts and/or pledge payments). Multiple donations from the same donor can appear in the list. When sending a mailing, it is possible to choose to send the mailing for each donation in the list (meaning that each donor might get multiple mailings), or to send a mailing to each donor in the list (meaning that each donor will only get one mailing).

A **Pledges SmartList** is one where the result is a list of pledges. Multiple pledges from the same donor can appear in the list. When sending a mailing, it is possible to choose to send the mailing for each pledge in the list (meaning that each donor might get multiple mailings), or to send a mailing to each donor in the list (meaning that each donor will only get one mailing).

Different criteria are available for the different types of SmartLists. For example, pledge-specific criteria like "Pledged Amount" or "Next Payment Date" are only available for a pledges SmartList.

CREATING A SMARTLIST

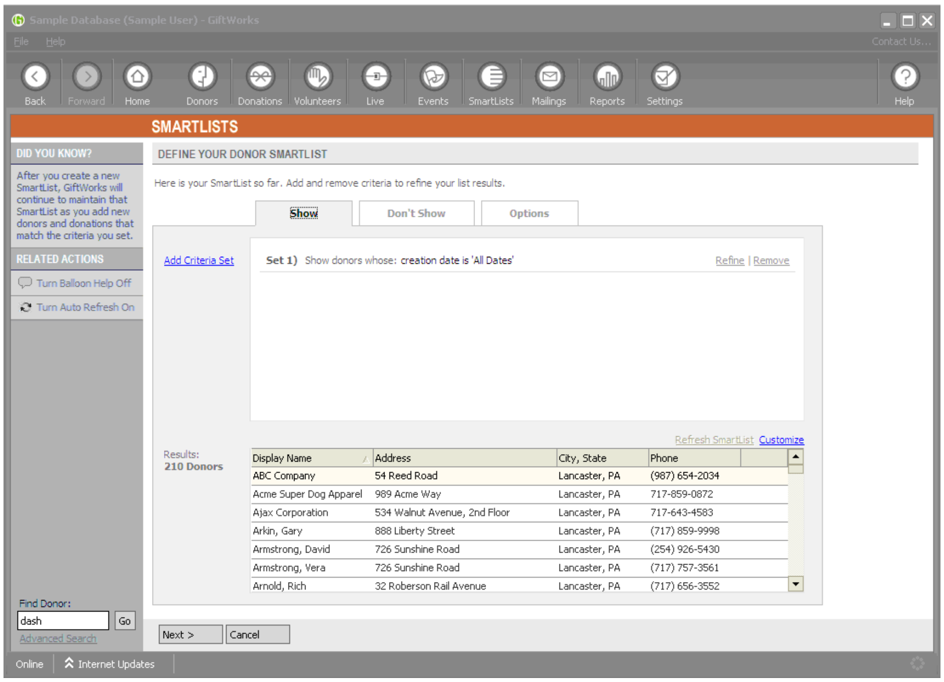
To create a SmartList, click the **SmartLists** icon at the top of GiftWorks, then click **Create a New SmartList**. Choose the type of SmartList you want to create: donors, donations, or pledges.



The next step is where you will choose your first criteria. The criteria are categorized to make them easier to locate. Choose criteria, then set the values for that criteria.

You can also create a SmartList based on any existing SmartList. Click **Create a new SmartList based on an existing one**, then choose an existing SmartList from the dropdown menu.

This takes you to the main SmartList definition window. Near the top of the screen is the criteria you just added. The bottom half of the screen shows the result set for the SmartList. From here, there are several options, each of which is explained in the items below.

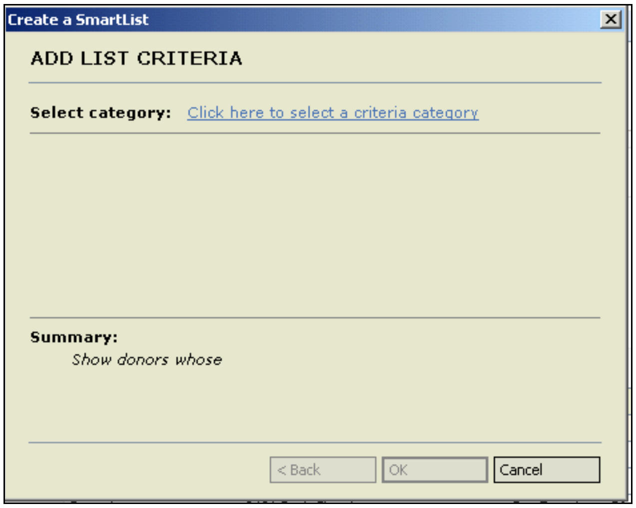


Adding Criteria Set

Once you've established your first criteria, you can modify the SmartList in several ways. One is to Add a Criteria Set.

When you Add a Criteria Set, you're defining a whole new set of donors, donations, or pledges to include in your SmartList. If we call your first criteria set "A" and the criteria set you're adding "B," you're asking the SmartList definition screen to "Show me everything meeting A and ALSO show me everything meeting B".

When you click the **Add Criteria Set** link, you will be presented with a list of criteria. Choose your new criteria, enter the detail, and click **Next**.

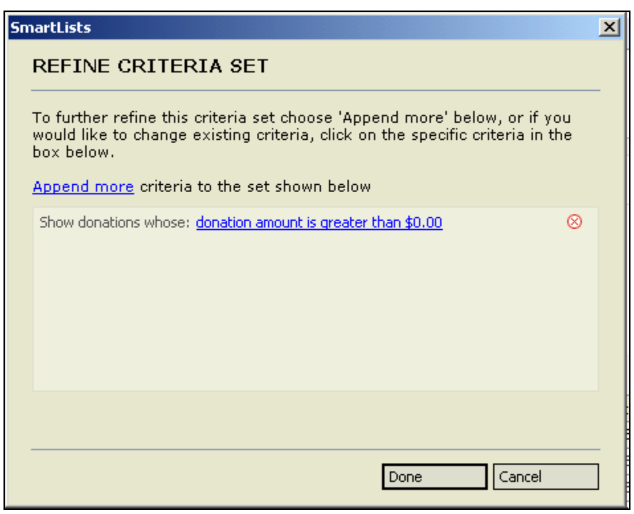


The SmartList is now the combination of the two criteria sets, and any donor, donation, or pledge that meets either criteria set is included.

A donor, donation, or pledge will only be included in the SmartList one time regardless of how many criteria sets it meets. The SmartList definition screen automatically eliminates duplicates from the list.

Refining Criteria

Another way to modify your SmartList is to refine your existing criteria. You can do this by clicking the **Refine** link to the right of any criteria sets. When you refine your criteria, you can append additional criteria to the existing set, change one of the criteria in the set, or remove one of the criteria in the set. When you click **Refine**, you are taken to the Refine Criteria Set window.



Clicking the criteria detail lets you modify that criteria. Clicking the red **X** removes that criteria. Clicking **Append** takes you to the Add List Criteria window and allows you to add additional criteria to this set, further limiting the results.

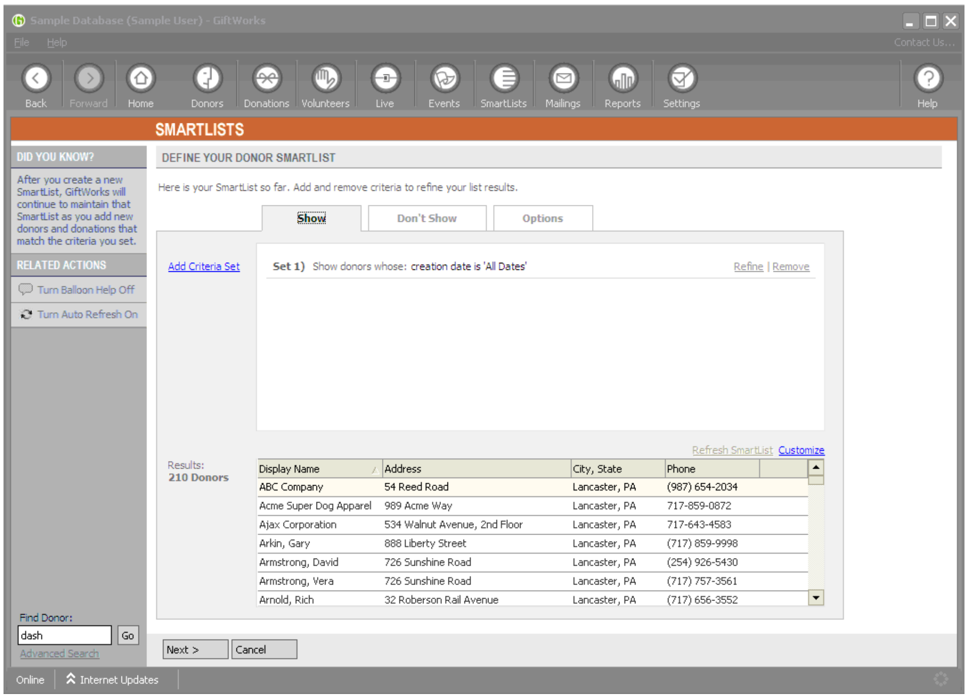
Click **Done** to return to the SmartList definition window.

Removing Criteria

To remove a criteria set from a SmartList, click the **Remove** link to the right of the set. The set will be removed, and the results area updated accordingly.

Using Show/Don't Show Options

At the top of the SmartList definition screen, there are always two tabs: Show and Don't Show. For Donor SmartLists only, there is a third tab: Options.

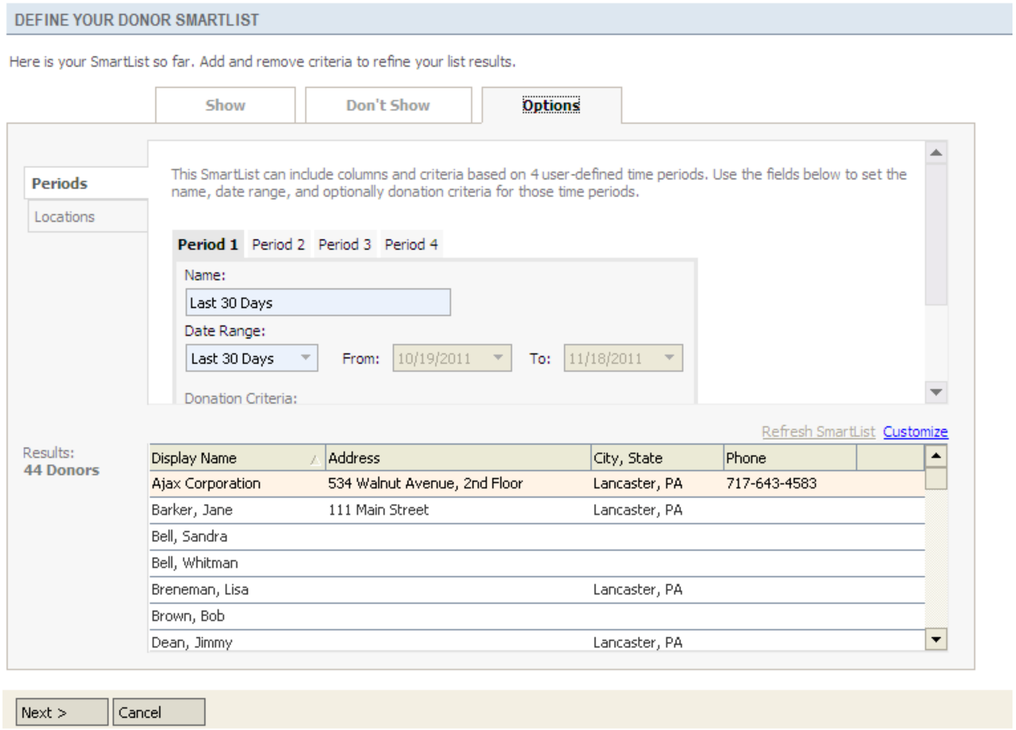


The first two modify the criteria you add to your SmartList. If you add criteria sets to the Don't Show tab, items meeting those criteria will be filtered from the Show criteria.

You can only see either Show or Don't Show criteria at one time. Click on the tabs to move back and forth between them.

Using the Options Tab

The Options tab in the SmartList definition screen (donor SmartLists only) lets you define up to four time periods for which you want to see specific information in your SmartList. For each time period, you can see total giving, average gift, largest donation, and number of donations. You can also use total donations for the custom time periods as criteria for your SmartList.

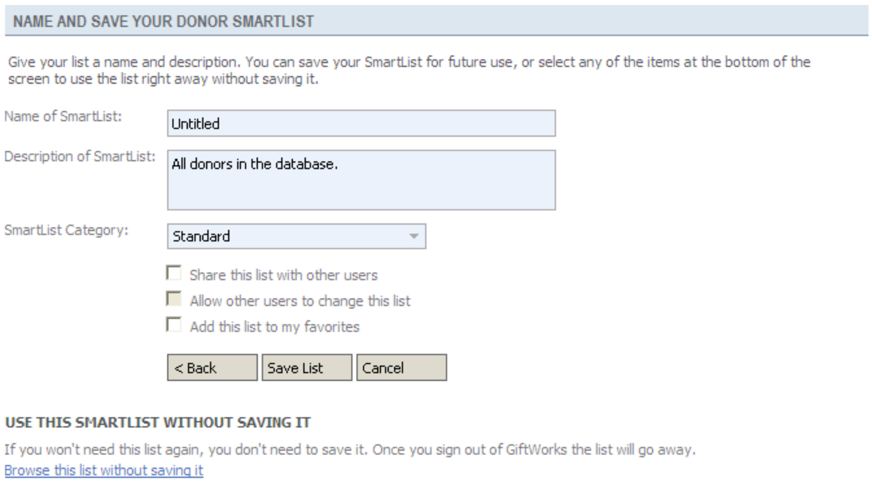


By default, GiftWorks includes Current Year, Current Fiscal Year, Previous Year, and Previous Fiscal Year. Use the custom time periods to define other periods. The periods can be fixed (such as February 1, 2008 through February 29, 2008), or can be floating (Current Week, Year to Date, or Next 3 Months). To define a fixed date range, choose the **Custom Dates** option from the Date Range drop-down list. You can give each time period a Name, such as “Next 3 Months”.

These custom periods can be useful for viewing comparative data on your SmartLists for multiple time periods. For example, to compare quarterly giving for each quarter of last year, set up a period for each quarter, then add the total giving field for each quarter to your SmartList (for more information, see Customizing a SmartList).

Saving a SmartList

When you have finished creating or editing a SmartList and clicked **Next**, you will see the options for naming and saving your SmartList.



The name you give your SmartList will be the name displayed in the lists of SmartLists throughout GiftWorks. The optional description can be used to provide more information about the SmartList, its contents, and how it should be used.

You can also choose a SmartList Category to segment your lists.

You can share you list with other users and also add it to your Favorite SmartLists.

If you share the list with other users, you can then also have the option to “Allow other users to change this list”

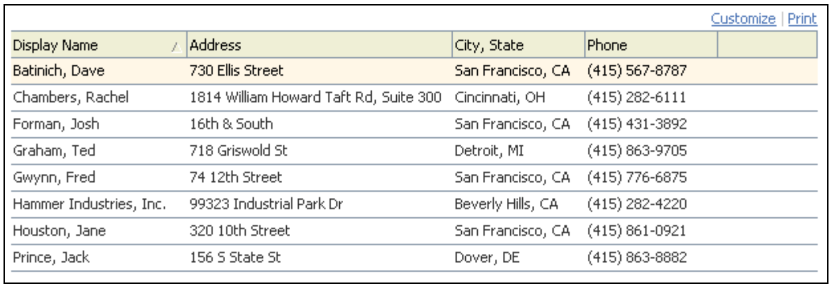
Once you have set the options for your SmartList, click **Save List** to save it or **Cancel** to leave without saving your changes
****NOTE: When creating or editing a SmartList, the list refreshes with each command. If you would like to turn the Auto Refresh off, click on the “Turn Auto Refresh Off” option on the left under Related Actions. Then after you have added/edited all of your criteria, click on the blue “Refresh SmartList” link above the results list – this will show you the finished list.

CUSTOMIZING A SMARTLIST

There are two ways to customize SmartLists in GiftWorks.

When you first build or define a SmartList, you can set the default customizations for that SmartList, which will be seen by other users when they first view the SmartList. Each user can also set customizations for each SmartList.

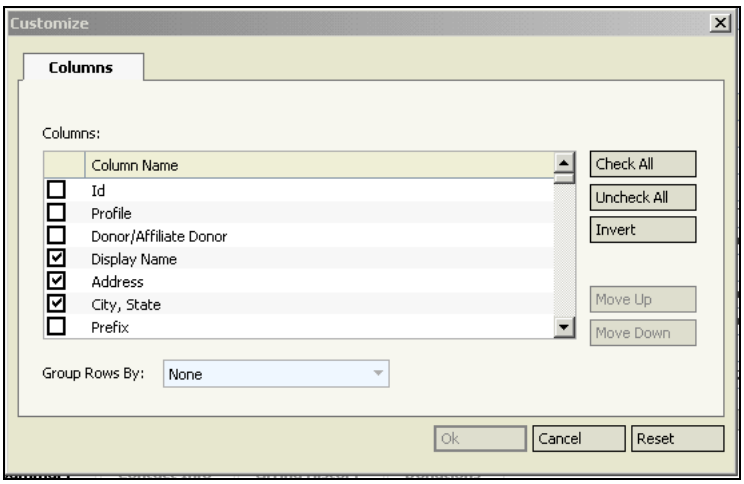
The customizable parts of a SmartList are the columns displayed in the SmartList results, and, optionally, a grouping of those results by the values in one of the columns.



Display Name	Address	City, State	Phone
Batinich, Dave	730 Ellis Street	San Francisco, CA	(415) 567-8787
Chambers, Rachel	1814 William Howard Taft Rd, Suite 300	Cincinnati, OH	(415) 282-6111
Forman, Josh	16th & South	San Francisco, CA	(415) 431-3892
Graham, Ted	718 Griswold St	Detroit, MI	(415) 863-9705
Gwynn, Fred	74 12th Street	San Francisco, CA	(415) 776-6875
Hammer Industries, Inc.	99323 Industrial Park Dr	Beverly Hills, CA	(415) 282-4220
Houston, Jane	320 10th Street	San Francisco, CA	(415) 861-0921
Prince, Jack	156 S State St	Dover, DE	(415) 863-8882

Customizing SmartList Columns

When you first build a SmartList, GiftWorks displays a set of default columns, which differ by SmartList type. To customize the list of columns displayed in the SmartList, click the **Customize** link in the top right of the results section of the SmartList definition screen.



Check or uncheck column names to add or remove them from the display. The list of available columns varies by SmartList type, but generally includes all fields for the donors, gifts, or pledges in the list, plus some aggregate fields from other types of records (donations for donors SmartLists, for example) as well as custom fields.

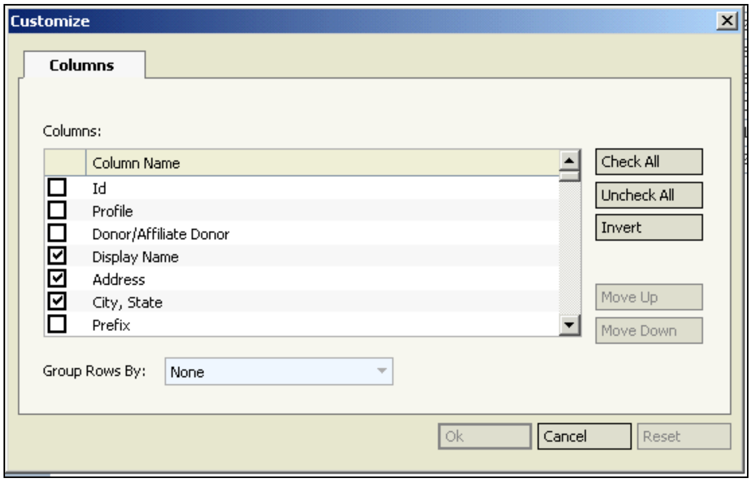
Clicking the **Reset** button at the bottom left of the customize window resets the columns to the default set for that SmartList type.

The customizations you make will be saved with the SmartList and will be seen by other users if they view the SmartList (see also Sharing a SmartList). Users can make their own customizations (see also Customizing a SmartList), but if they reset their customizations, it will revert to the options you choose here.

Grouping SmartList Results

When customizing a SmartList view, you can choose the grouping for the result set of the SmartList.

The grouping selection is at the bottom of the customize screen and includes the full list of columns available for the SmartList you are customizing.

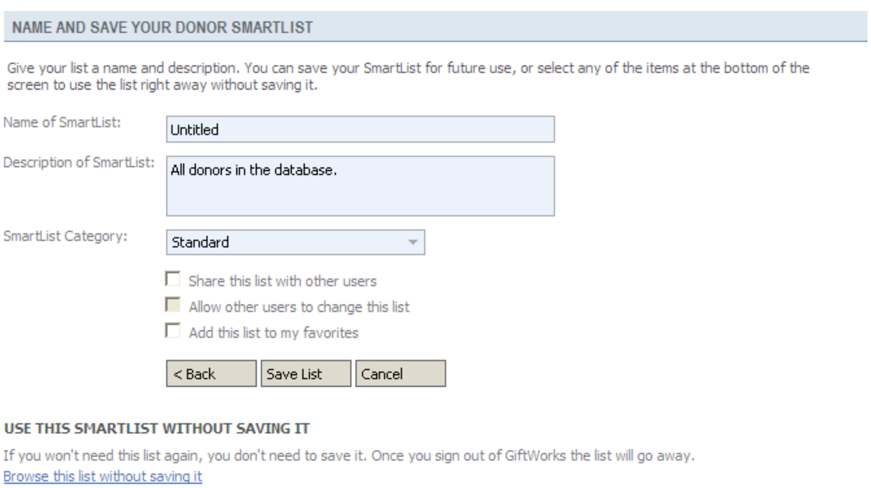


If you choose a column to group the rows by, rows with the same value will be grouped together under a header with that value. You can collapse or expand each grouped set by clicking the plus or minus at the top left of each group.

CATEGORIZING SMARTLISTS

GiftWorks gives you the option of categorizing your SmartLists, which makes it easier to keep them organized so you can quickly locate them.

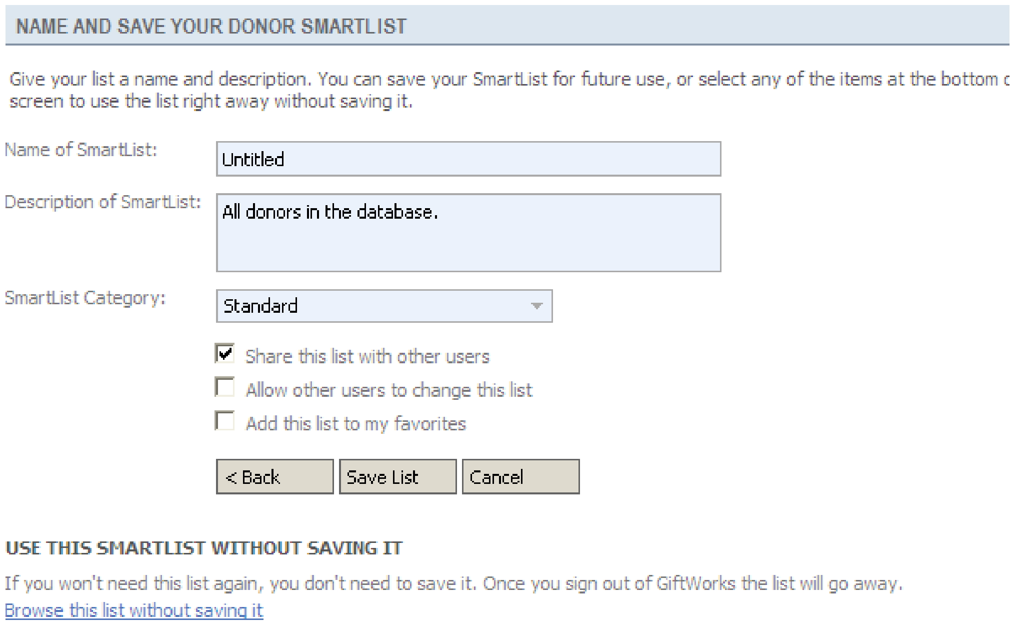
On the Name and Save screen, select an existing category or add a category by selecting the appropriate option in the SmartList Category drop-down list.



A SmartList's category can only be changed by the creator of that SmartList. When you view your SmartLists by going to the SmartList section and clicking **View all SmartLists**, the SmartLists will be displayed in collapsible/expandable categories.

SHARING A SMARTLIST

When saving or editing a SmartList, you can choose to share that SmartList with other users of GiftWorks.

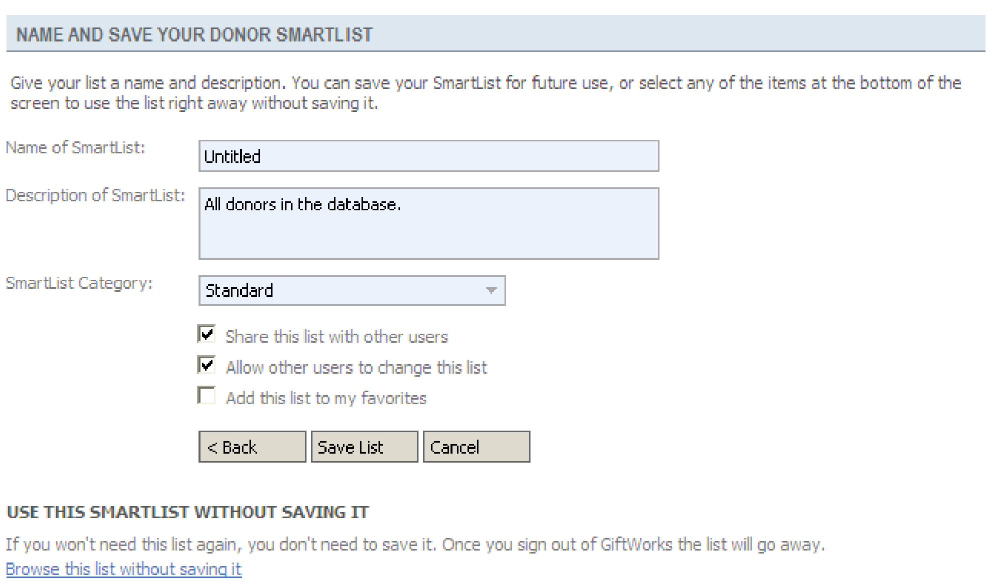


If you check the **Share this list with other users** checkbox, the SmartList will be available to all users of GiftWorks within your organization. They will be able to view the SmartList and customize their own view of that SmartList. Only the creator of a SmartList can edit a SmartList or change its default customizations.

If you choose not to share a SmartList with others, it will only be visible to you.

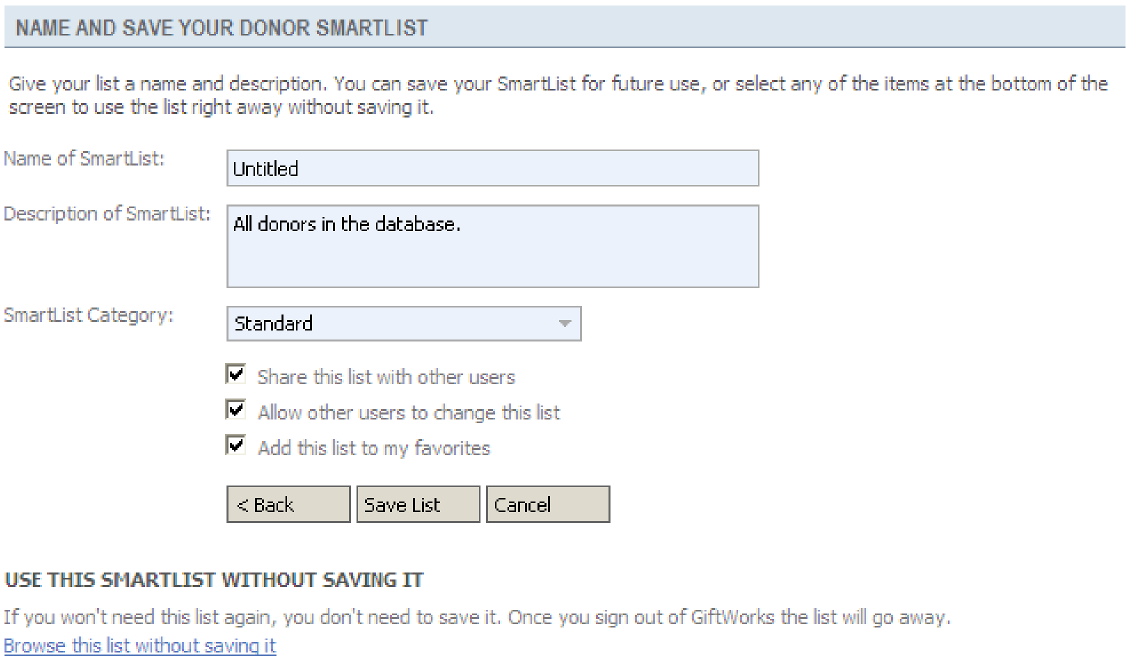
ALLOWING OTHER USERS TO CHANGE YOUR LIST

If you check the **Share this list with other users** checkbox, you will then also have the option to allow other users to change the list.



ADDING A SMARTLIST TO YOUR FAVORITES

When saving or editing a SmartList, you can choose to add the SmartList to your Favorites.

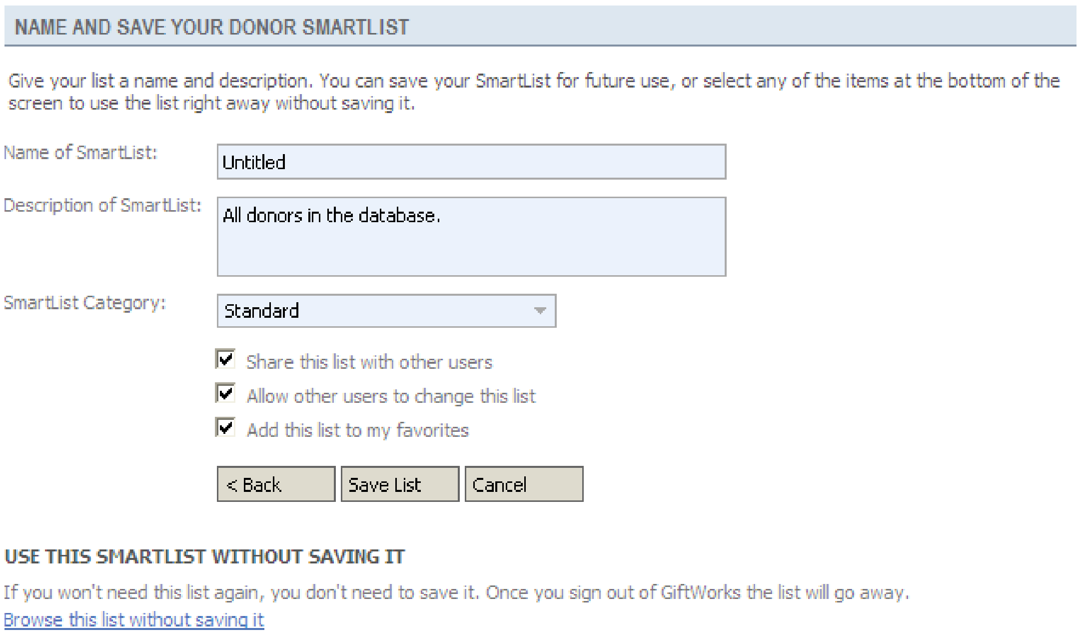


The list of Favorite SmartLists appears throughout GiftWorks and gives you easy, one-click access to the SmartLists you use most often.

You can also manage your list of Favorite SmartLists by clicking the **Manage** button wherever your Favorites are displayed.

BROWSING A TEMPORARY SMARTLIST

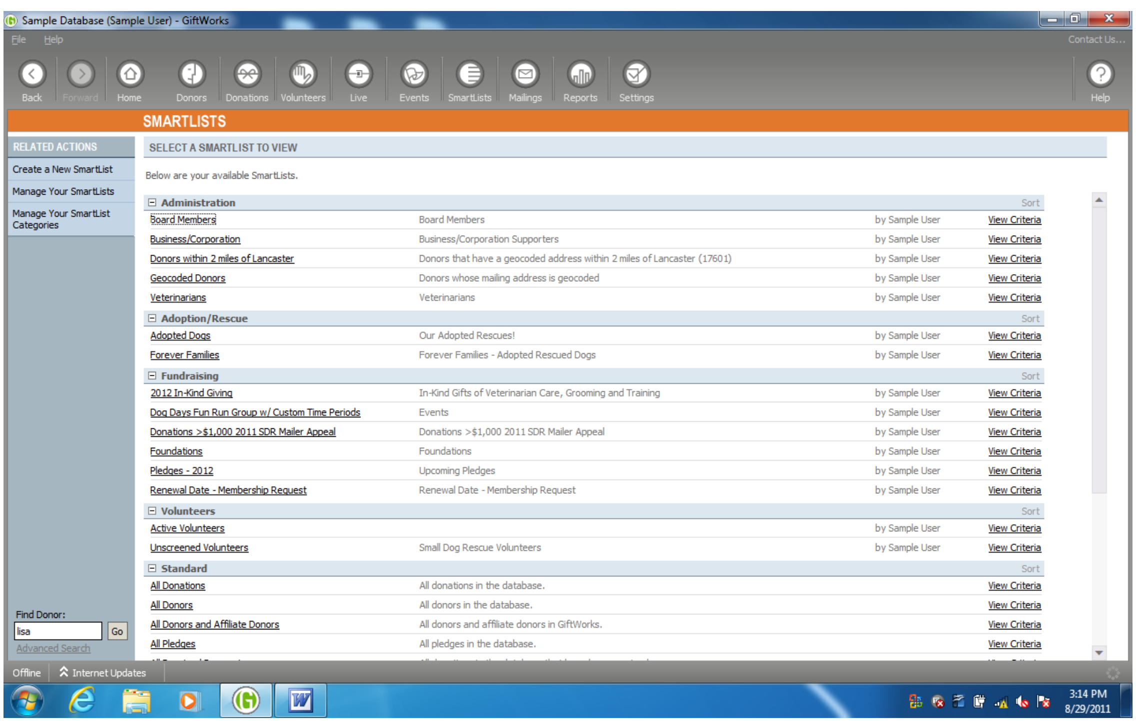
On the Name and Save your SmartList screen, you have the option to browse results without saving the SmartList. This can be useful if you are creating a SmartList that you will only need temporarily.



You can use the SmartList to produce a report, mailing, or just to browse. If you navigate away from the SmartList (to another SmartList, for example), the temporary SmartList goes away.

VIEWING ALL SMARTLISTS

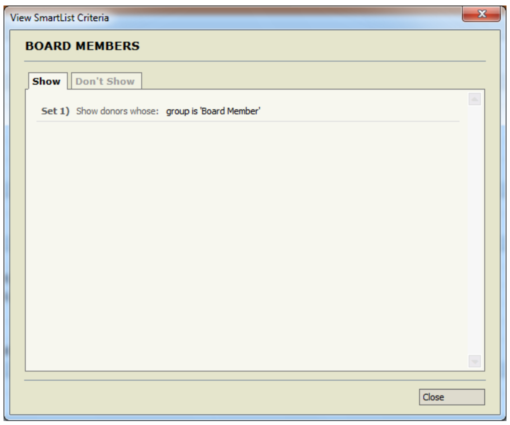
From the main SmartLists screen, you can view all available SmartLists by clicking the **View All SmartLists** link.

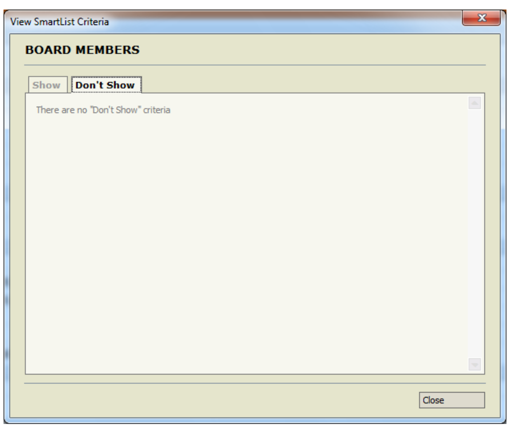


This displays a categorized list of the names, descriptions, and creators of all SmartLists you can view from your user account. This includes built-in SmartLists, SmartLists you have created (which can optionally be shared with other users), and SmartLists that other users created and shared.

From the View All SmartLists screen, you can click the name of any SmartList to view the results of that SmartList. You can also collapse or expand the SmartList categories.

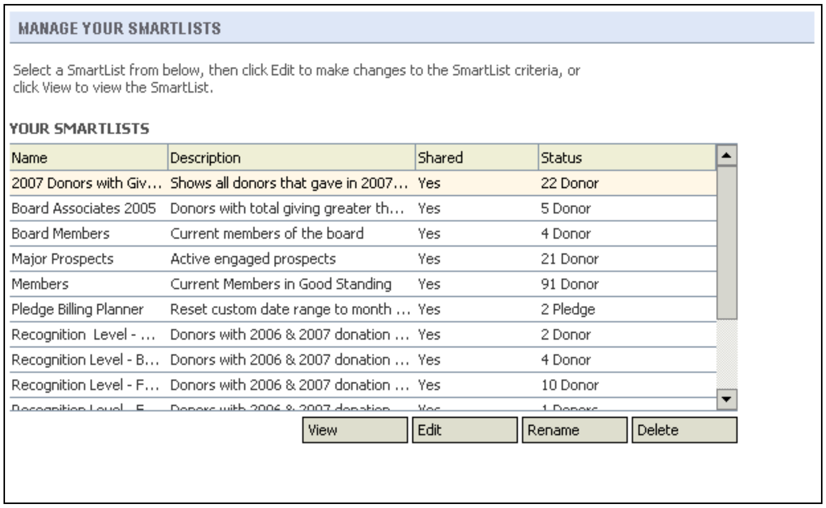
You can view the SmartList criteria from View All SmartLists screen. Click “View criteria” link beside list (can also pull up SmartList then click on ‘View Criteria” under Related Actions area on left)





MANAGING YOUR SMARTLISTS

From the main SmartLists screen, click **Manage Your SmartLists** to view, edit, rename, or delete any of the SmartLists you created.

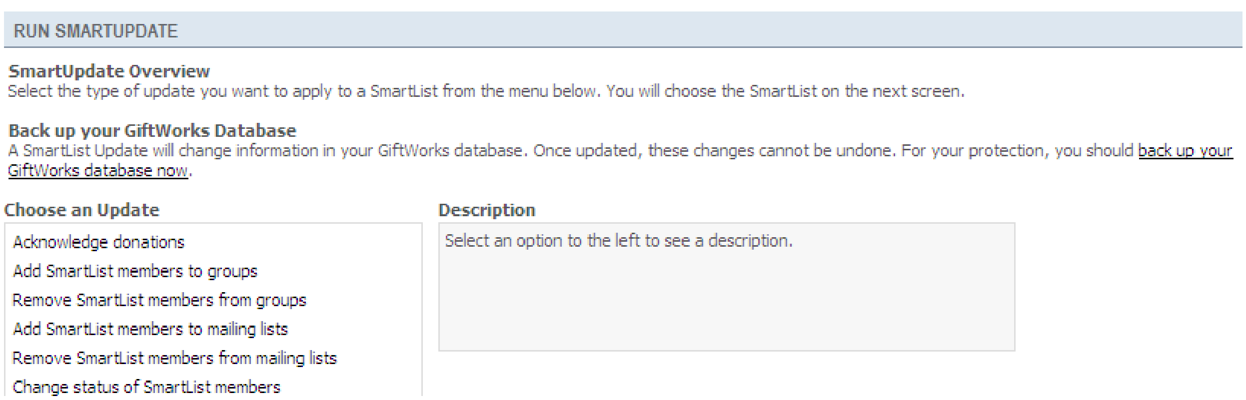


Editing a SmartList lets you change the criteria, default customizations, custom time periods, and other attributes of a SmartList.

Run SmartUpdate for List (Batch Updates)

GiftWorks gives you the ability to change a select number of items for each of the donors, donations, or pledges in a SmartList.

These options are available in the Related Actions menu when viewing a SmartList, or in the Settings section under Additional Settings & Tools.

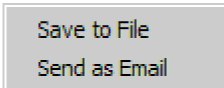


You can choose which changes to make to which SmartList. The changes you make will be applied to each of the donors, donations, or pledges in the SmartList.

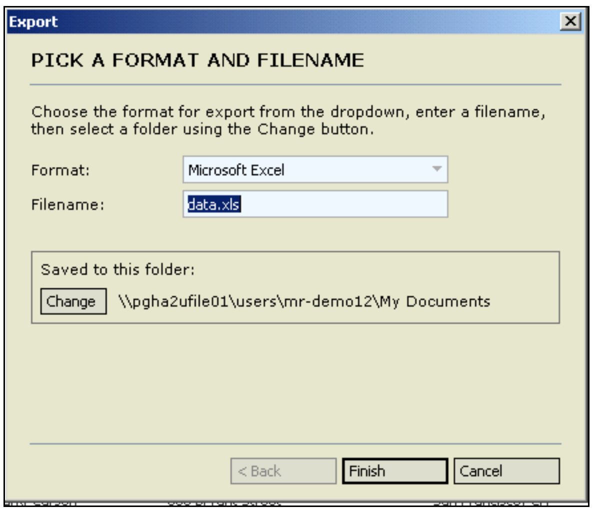
Exporting a SmartList

You can export the results of a SmartList to a Microsoft Excel, CSV, or XML file. This option is available when viewing a SmartList in the Related Actions menu, or from the Settings section under Import and Export Data.

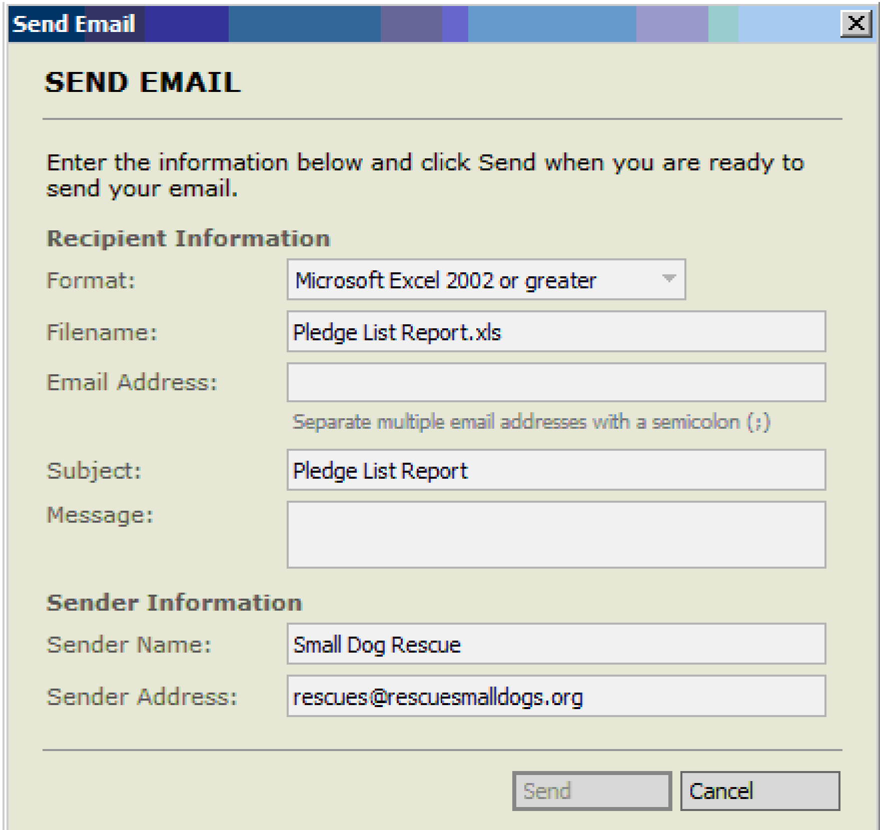
When you click on Export this List you will have the option to 'Save to File' or "Send as Email'



Save to File
You can choose the file name and location you want to export the SmartList to. The columns that are displayed in the SmartList will be exported to the file, which can be used for other applications.

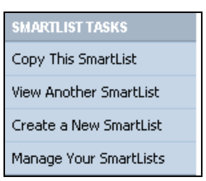


Send as Email
You can email the SmartList as an attachment. Choose the format and filename. Enter in the email address of the recipient as well as a Subject. Fill out the Sender Information and click Send.



Copying a SmartList

To create a SmartList based on an existing SmartList (including the built-in SmartLists that are included with GiftWorks or SmartLists created by other users), you can do so by clicking **Copy This SmartList** in the **SmartList Tasks** menu while viewing a SmartList. This option is also available on the first step of the Create a New SmartList process.



When you create a SmartList based on an existing SmartList, all of the criteria, default customizations, and custom time periods are created in the copy. You can then edit any of the SmartList settings and save your new SmartList.

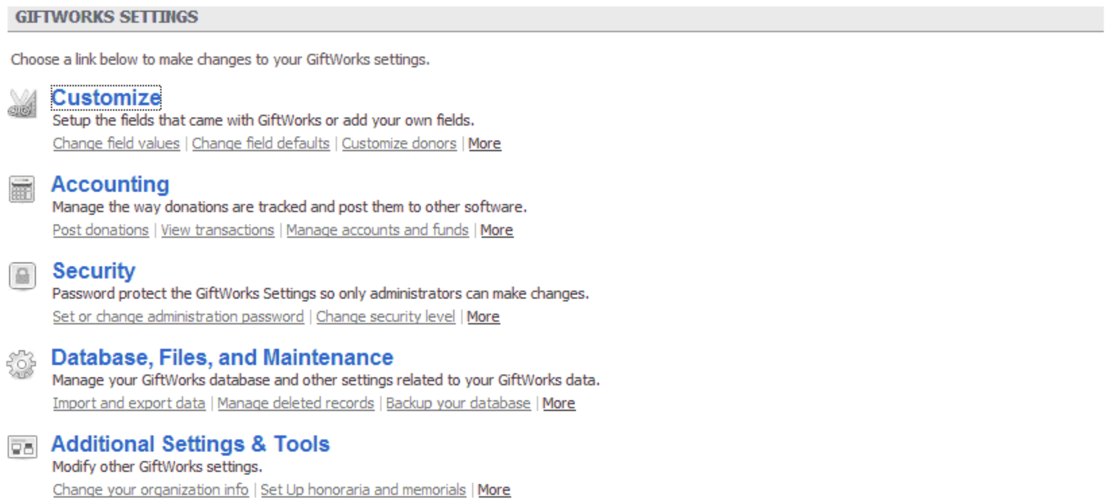
Deleting a SmartList

Deleting a SmartList will delete the SmartList from the list of available SmartLists. You can only delete a SmartList that you created. Deleting a SmartList has no effect on the donors, donations, or pledges in that SmartList.

You can also delete the contents of a SmartList, which deletes all of the donors, donations, or pledges in the SmartList. This option is available from the Settings section of GiftWorks.

Deleting SmartList Contents

To delete the donors, donations, or pledges in a SmartList, visit the **Settings** section, and click **Database, Files and Maintenance**. Then click **Delete Information from Your Database**.



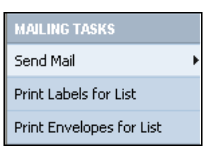
Clicking **Delete SmartList Contents** allows you to select a SmartList and delete all of the donors, donations, or pledges in that SmartList out of your database file..

This can be useful if you want to clean up your database or otherwise get rid of some records. **Please note that this deletion is permanent and cannot be undone unless you create a backup of your database before you delete the SmartList contents and then restore that backup.**

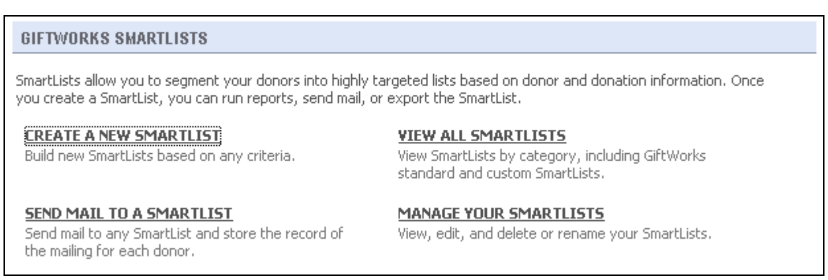
SENDING MAIL TO A SMARTLIST

You can use any SmartList as the basis for a mailing.

When viewing the SmartList, click **Send Mail** in the **Mailing Tasks** menu.

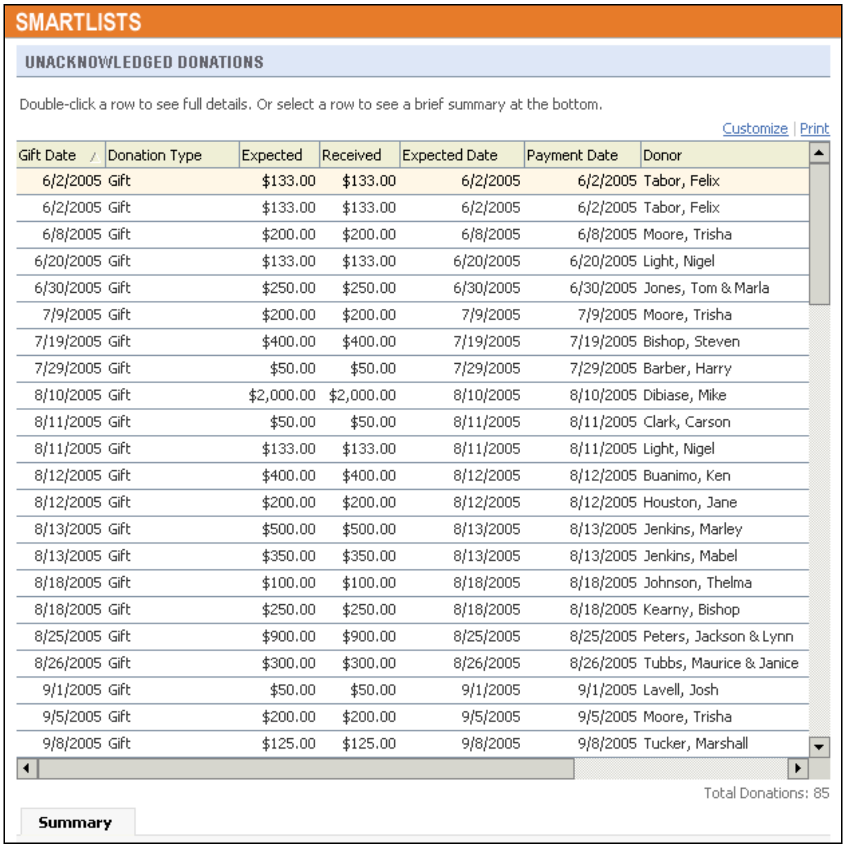


Or, from the main SmartLists screen, click **Send Mail to a SmartList**. Or, from the main Mailing screen, click **Send Mail**, then choose the SmartList you'd like to send your mailing to.



PRINTING A SMARTLIST

When viewing a SmartList, you can print that SmartList as displayed on the screen by clicking the **Print** link in the top right corner.



SMARTLISTS

UNACKNOWLEDGED DONATIONS

Double-click a row to see full details. Or select a row to see a brief summary at the bottom.

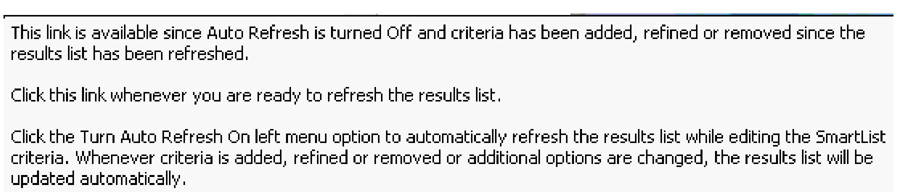
Customize | Print

Gift Date	Donation Type	Expected	Received	Expected Date	Payment Date	Donor
6/2/2005	Gift	$133.00	$133.00	6/2/2005	6/2/2005	Tabor, Felix
6/2/2005	Gift	$133.00	$133.00	6/2/2005	6/2/2005	Tabor, Felix
6/8/2005	Gift	$200.00	$200.00	6/8/2005	6/8/2005	Moore, Trisha
6/20/2005	Gift	$133.00	$133.00	6/20/2005	6/20/2005	Light, Nigel
6/30/2005	Gift	$250.00	$250.00	6/30/2005	6/30/2005	Jones, Tom & Marla
7/9/2005	Gift	$200.00	$200.00	7/9/2005	7/9/2005	Moore, Trisha
7/19/2005	Gift	$400.00	$400.00	7/19/2005	7/19/2005	Bishop, Steven
7/29/2005	Gift	$50.00	$50.00	7/29/2005	7/29/2005	Barber, Harry
8/10/2005	Gift	$2,000.00	$2,000.00	8/10/2005	8/10/2005	Dibiase, Mike
8/11/2005	Gift	$50.00	$50.00	8/11/2005	8/11/2005	Clark, Carson
8/11/2005	Gift	$133.00	$133.00	8/11/2005	8/11/2005	Light, Nigel
8/12/2005	Gift	$400.00	$400.00	8/12/2005	8/12/2005	Buanimo, Ken
8/12/2005	Gift	$200.00	$200.00	8/12/2005	8/12/2005	Houston, Jane
8/13/2005	Gift	$500.00	$500.00	8/13/2005	8/13/2005	Jenkins, Marley
8/13/2005	Gift	$350.00	$350.00	8/13/2005	8/13/2005	Jenkins, Mabel
8/18/2005	Gift	$100.00	$100.00	8/18/2005	8/18/2005	Johnson, Thelma
8/18/2005	Gift	$250.00	$250.00	8/18/2005	8/18/2005	Kearny, Bishop
8/25/2005	Gift	$900.00	$900.00	8/25/2005	8/25/2005	Peters, Jackson & Lynn
8/26/2005	Gift	$300.00	$300.00	8/26/2005	8/26/2005	Tubbs, Maurice & Janice
9/1/2005	Gift	$50.00	$50.00	9/1/2005	9/1/2005	Lavell, Josh
9/5/2005	Gift	$200.00	$200.00	9/5/2005	9/5/2005	Moore, Trisha
9/8/2005	Gift	$125.00	$125.00	9/8/2005	9/8/2005	Tucker, Marshall

Total Donations: 85

Summary

When adding or editing a SmartList there is an option on left: (Turn Auto Refresh On/Off). This feature will allow you to change the criteria on the list without it updating with each change. You can then click on the "Refresh Smartlist" link and the list will refresh/update.

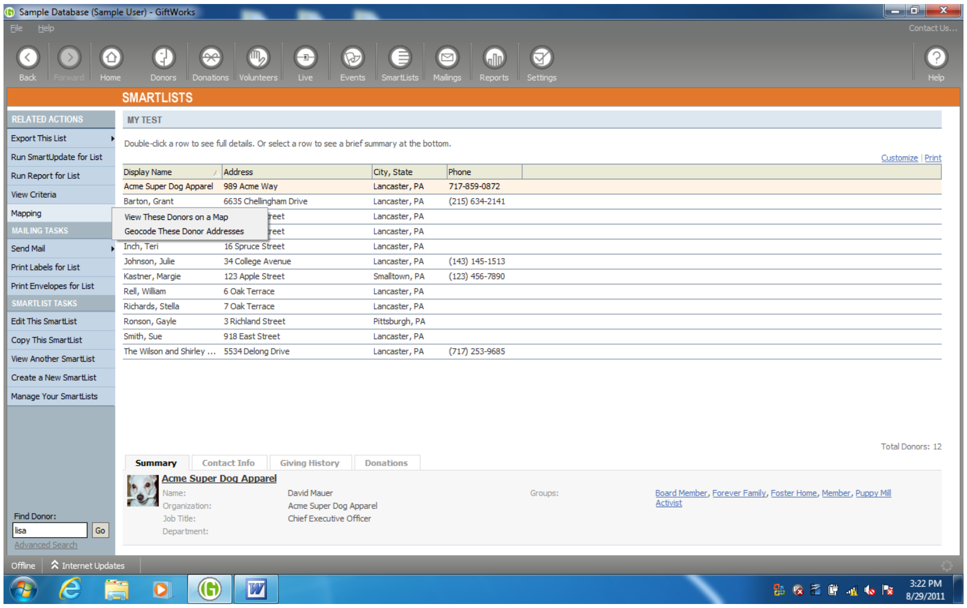


This link is available since Auto Refresh is turned Off and criteria has been added, refined or removed since the results list has been refreshed.

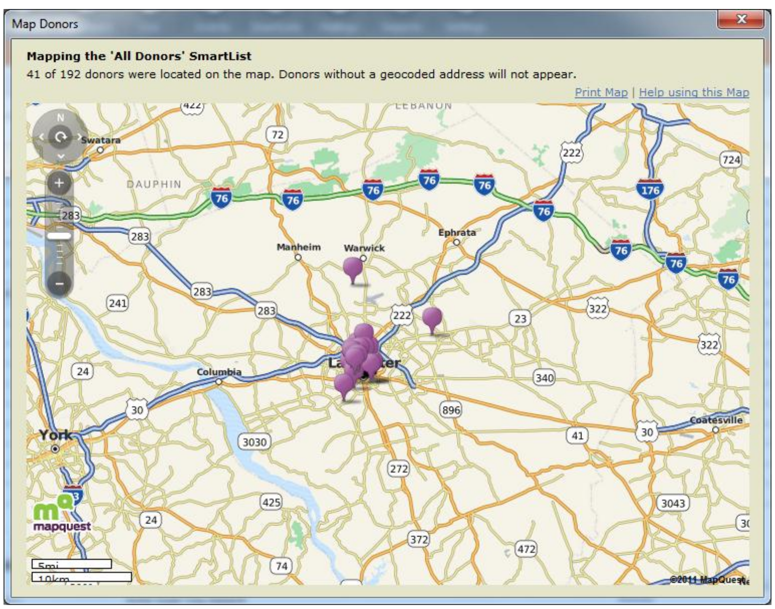
Click this link whenever you are ready to refresh the results list.

Click the Turn Auto Refresh On left menu option to automatically refresh the results list while editing the SmartList criteria. Whenever criteria is added, refined or removed or additional options are changed, the results list will be updated automatically.

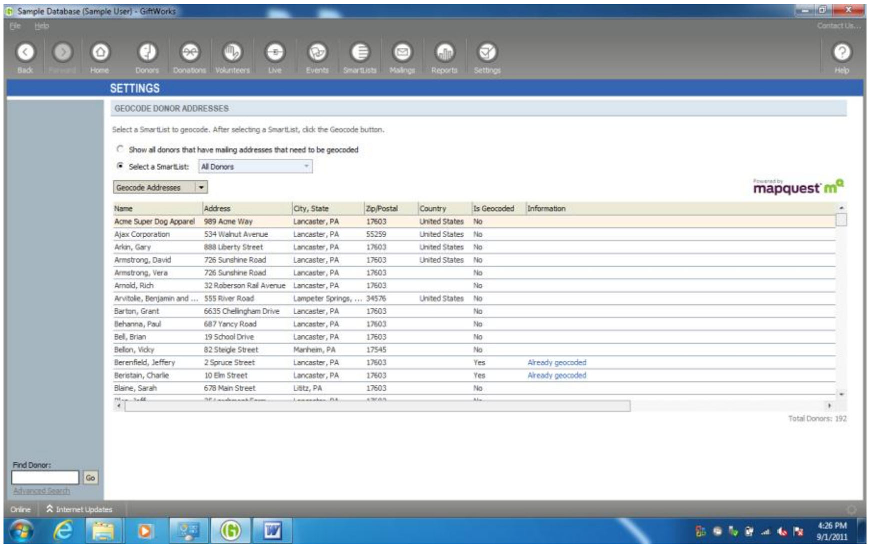
When viewing a SmartList there is a new option on left under “Related Actions” for ‘Mapping’

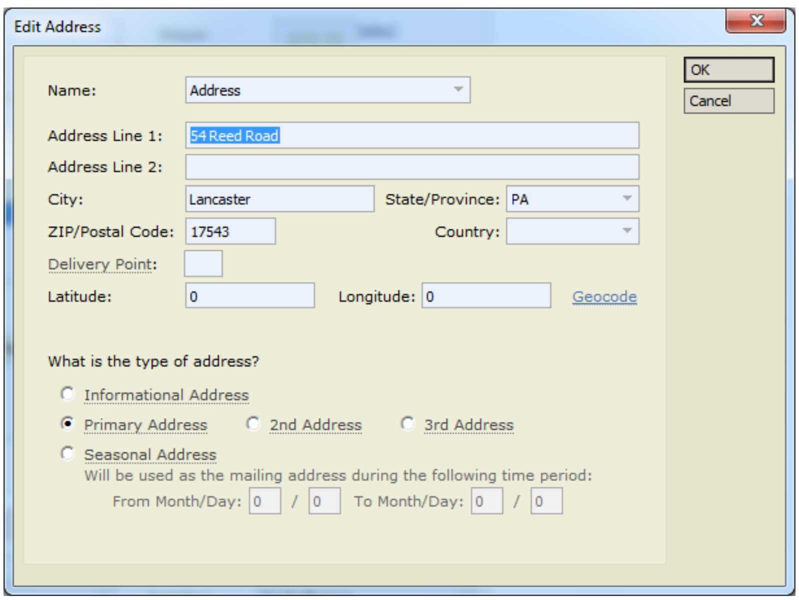


You can ‘View These Donors on a Map’



You can also ‘Geocode These Donor Addresses’ - Geocoding is the process of determining the latitudinal and longitudinal coordinates for a specific address. GiftWorks will include the ability to store geocoding data with an address. This will support the ability to create reports that plot addresses on a map, donor lookups based on distances from a map point, and more powerful mapping tools.


Sample Database (Sample User) - GiftWorks
Back
Forward
Home
Donors
Donations
Volunteers
Live
Events
SmartLists
Mailings
Reports
Settings
Help
SETTINGS
GEOCODE DONOR ADDRESSES
Select a SmartList to geocode. After selecting a SmartList, click the Geocode button.
Show all donors that have mailing addresses that need to be geocoded
Select a SmartList: All Donors
Geocode Addresses
mapquest
Name
Address
City, State
Zip/Postal
Country
Is Geocoded
Information
Total Donors: 192
Find Donor:
Go
Advanced Search

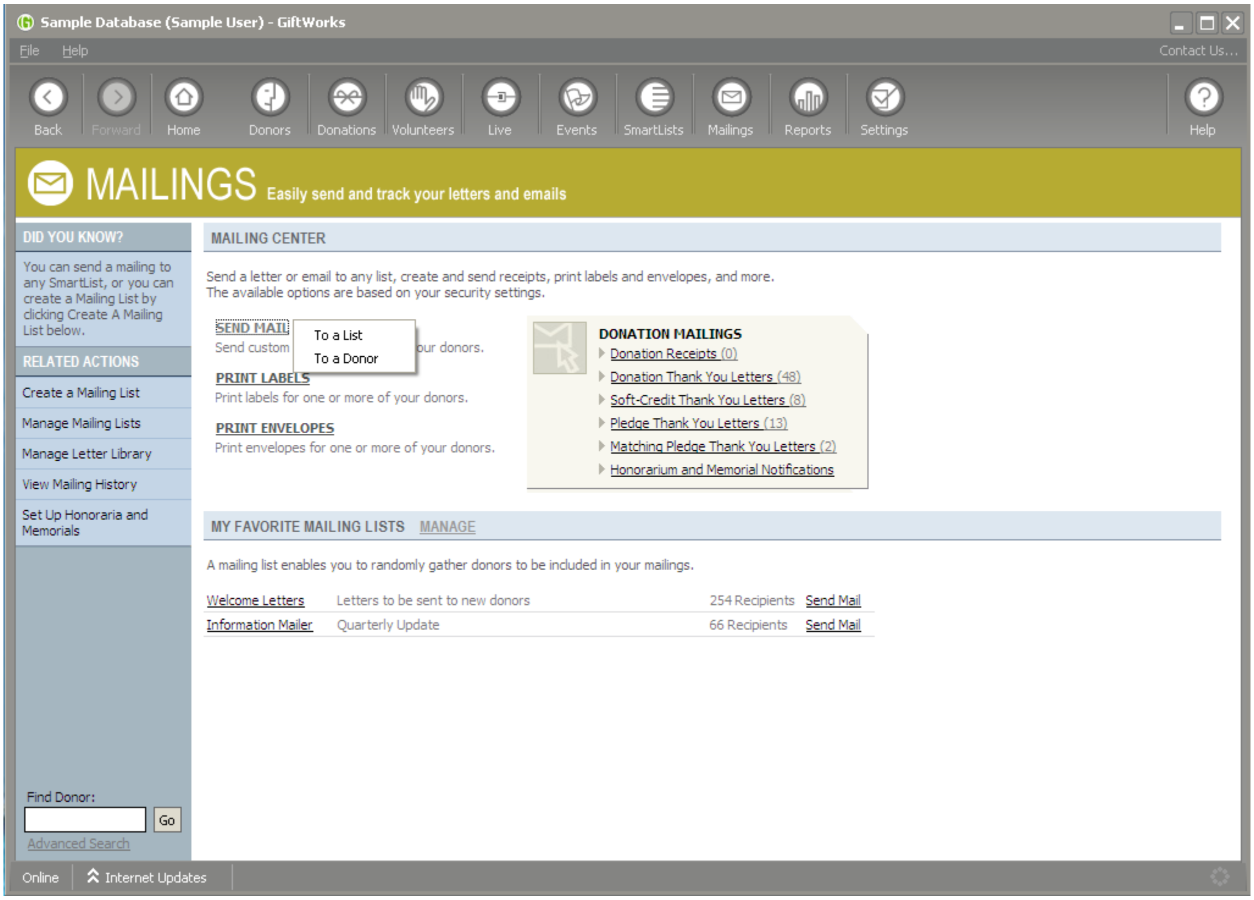

Edit Address
OK
Cancel
Name:
Address
Address Line 1:
54 Reed Road
Address Line 2:
City:
Lancaster
State/Province:
PA
ZIP/Postal Code:
17543
Country:
Delivery Point:
Latitude:
0
Longitude:
0
Geocode
What is the type of address?
Informational Address
Primary Address
2nd Address
3rd Address
Seasonal Address
Will be used as the mailing address during the following time period:
From Month/Day:
0
/
0
To Month/Day:
0
/
0

MAILING CENTER

IN THIS SECTION

MAILING CENTER OVERVIEW

Great communications and strong relationships are the cornerstones of any successful development program. Creating such a solid foundation requires the timely sharing of news and information with your constituency, prompt thank-you letters, and frequent personal communications.



The Mailing Center in GiftWorks is a comprehensive donor communications center. With complete mailing and emailing resources all in one place, the process of informing, asking, thanking, and tracking has never been so quick or simple.

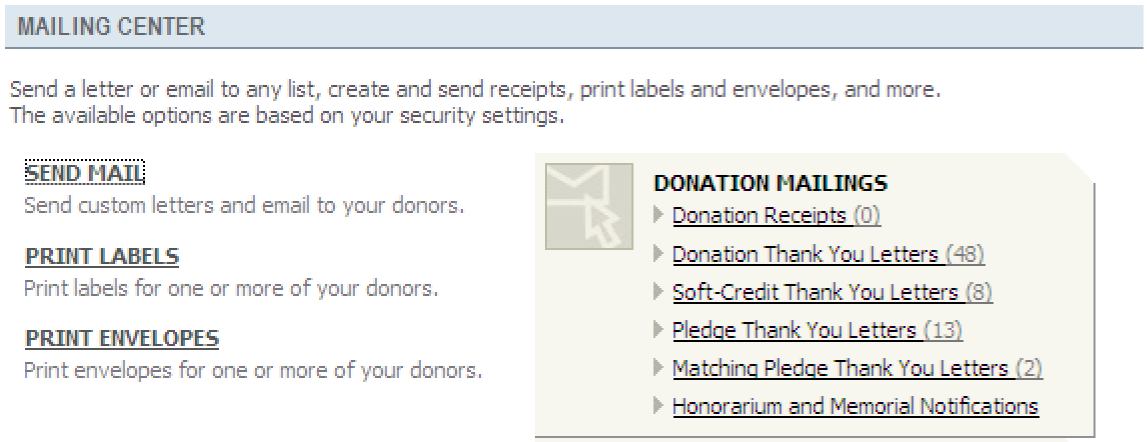
- Create letters for solicitations, thank yous, and other communications
- Save your mailings and organize them in a Letter Library
- Use prewritten letters or create your own templates
- Use custom mailing lists or SmartLists to generate targeted mailings
- Customize and preview letters and layouts before printing
- Print labels and envelopes using the comprehensive selection of label and envelope types

  PREMIUM Prepare USPS discounted mailings for qualified mailings. See the MAILING GUIDE for more information on how to prepare a USPS discounted mailing with GiftWorks Premium.

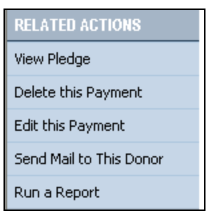
SENDING MAIL AND EMAIL

There are several ways to create and send mail and email in GiftWorks. You can send mail and email to a single donor, or to a group of donors using SmartLists and Mailing Lists.

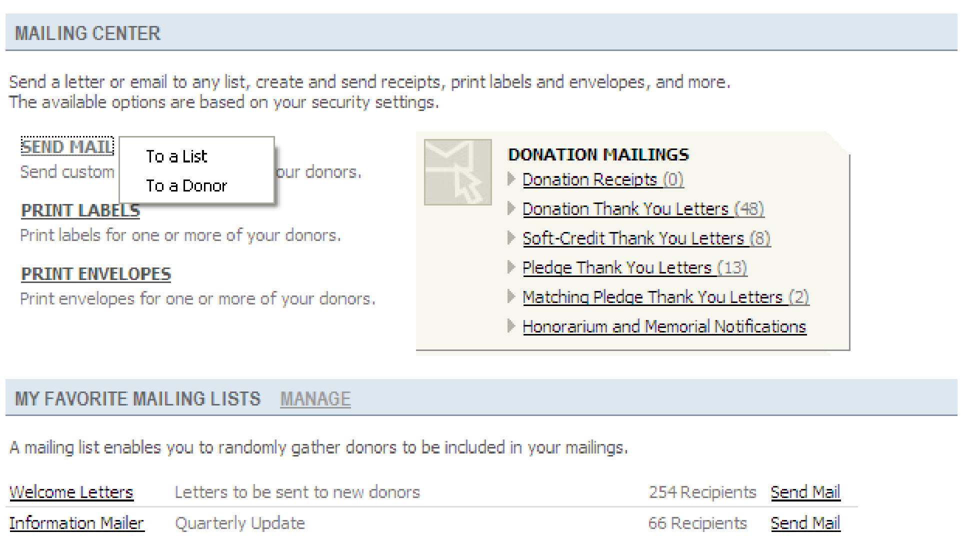
To begin the mailing process, click **Send Mail** in either the main work area of your Mailings screen or the **Related Actions** menu on the left side of the screen.



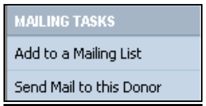
You can also click the **Send Mail** link in the left menu when viewing a SmartList, donor, pledge, or donation.



Mailing to One Donor
You can send a letter or email to one donor in two ways. From the main Mailings page, click **Send Mail**, then click **To a Donor**.

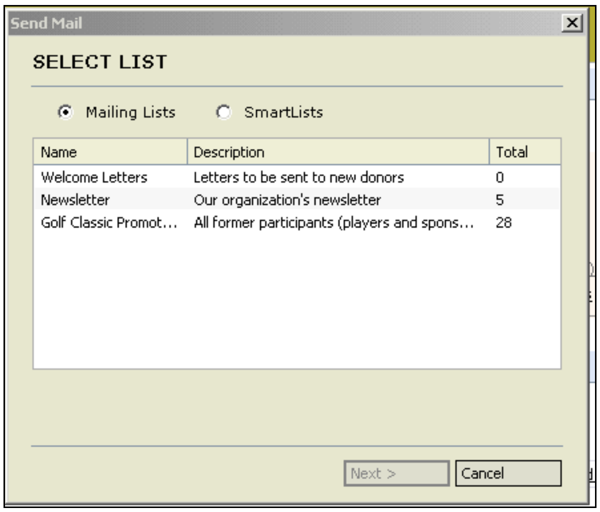


Or, when viewing a donor, click **Send Mail to this Donor** in the left Mailing Tasks menu.

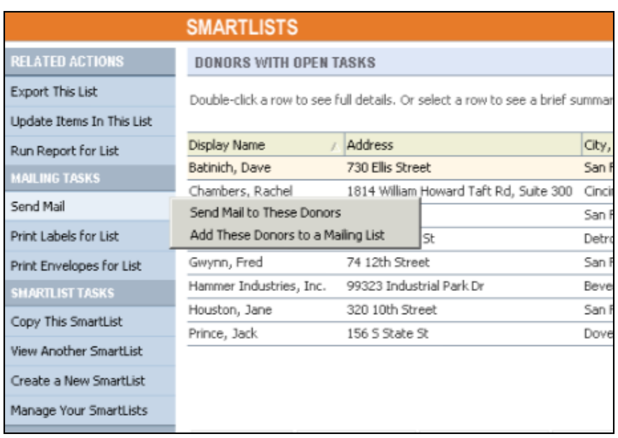


Mailing to Mailing Lists and SmartLists

To send mail to a Mailing List or SmartList, you have two options. You can click the **Send Mail** link on the main page of the Mailing section, then click **To a List** and select **Mailing Lists** or **SmartLists**.



Or, if you are viewing a SmartList, you can click **Send Mail**, then click **Send Mail to these Donors**.



If you are viewing a donations or pledges SmartList, you have the option of sending mail to the donors in the list, or of sending mail for the donations or pledges in the list.

Donors vs. Donations/Pledges

When mailing to a donations or pledges SmartList, you have the option of sending to the donors in the list or of sending for the donations or pledges in the list.

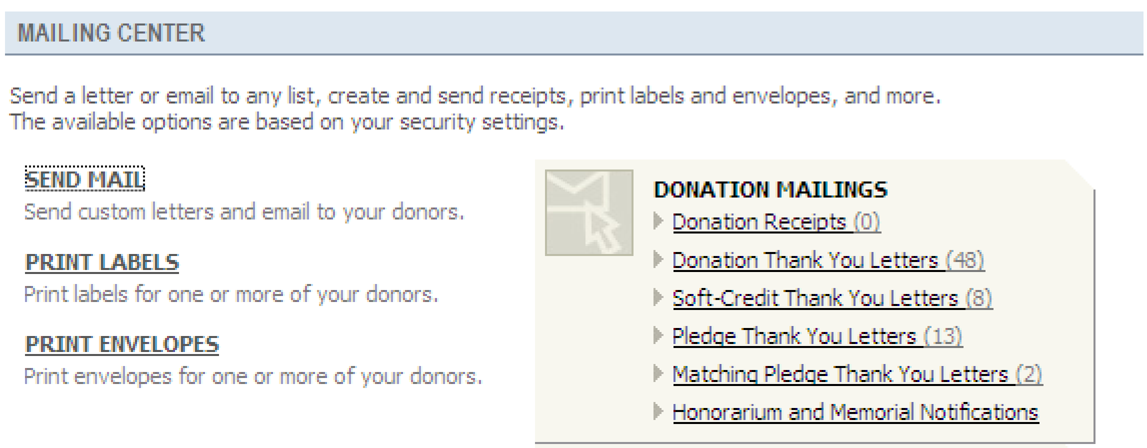
Sending to the donors generates one letter or email for each donor in the list, regardless of how many

donations that donor has in the list. You might use this if you want to send mail to everyone who donated to a certain campaign or during a certain time period last year.

Sending mail for the donations or pledges in a list generates one letter or email for each donation or pledge in the SmartList, even if that means generating more than one letter per donor. You might use this to send thank yous or some other acknowledgement of those donations or pledges. Please note: you typically acknowledge donations and pledges using the built-in donation mailings.

Donation Mailings
GiftWorks has built-in donation mailings to help you acknowledge and send notifications about new donations or pledges. On the main Mailings page, donation mailings are listed in a gray box at the top right of the main work area. There are five donation mailings:

- Donation Receipts
- Donation Thank You Letters
- Soft-Credit Thank You Letters
- Pledge Thank You Letters
- Matching Gift Thank You Letters
- Honorarium and Memorial Notifications

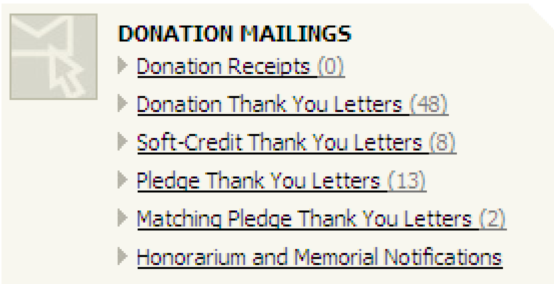


Each serves a specific purpose in your donation processing and acknowledgement process. Donation mailings differ from regular mailings sent through GiftWorks in that they can be used to automatically mark donations or pledges as receipted or acknowledged.

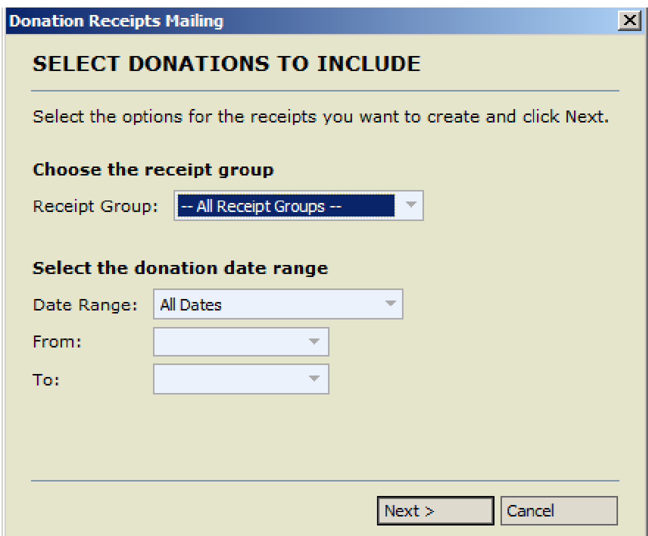
The automation of these acknowledgement processes allows your organization to easily track your donations and ensures that your donor's generosity is acknowledged in a timely manner.

Donation Receipts
GiftWorks 2011 improves the way receipts are issued and tracked. This improved control will also help your year-end receipting process.   Many of the receipting requirements will be satisfied by creating more flexibility in the way receipts are generated rather than creating specific processes such as Year-End receipting. This type of flexibility will allow Canadian customers to print year-end receipts. It will also provide more flexibility and tracking will be created around the process of editing and re-printing receipts.

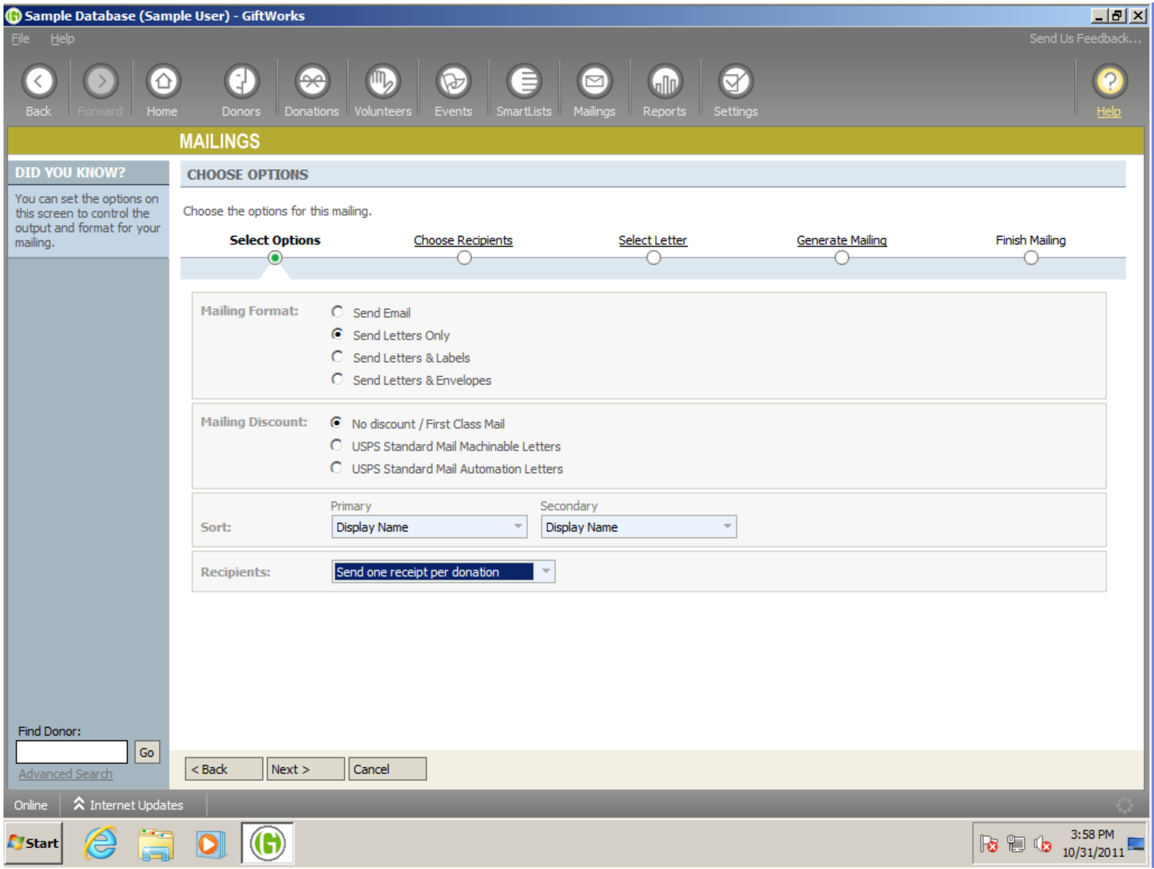
When you are ready to send out receipts for these donations, go to the main Mailings page and select Donation Receipts in the Donation Mailings Box at the top right of the main work area.



You will now get a dialog which allows you to choose a Date Range and Receipt Group to more easily send Receipts

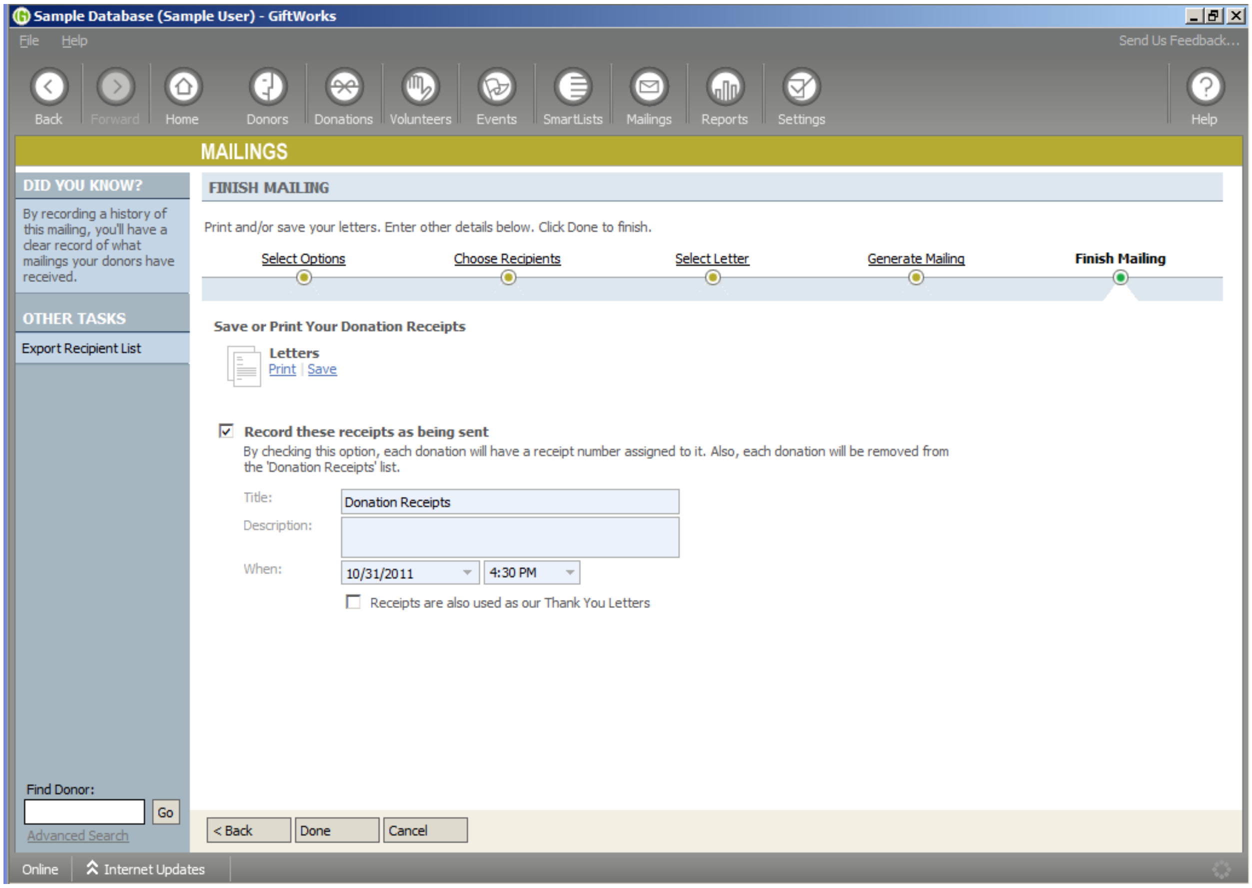


You can now choose to send one Receipt for multiple donations where the donations will all have the same Receipt number



You can create or modify the receipt letter template set to be used as your receipt. Please note: only a letter of type Receipt can be used for the Donation Receipts mailing.

During the Finish Mailing step of the mailing process, you have the option of recording that the receipts were sent. This automatically assigns a receipt number to each donation, and removes the donations from the Donations Receipts mailing.

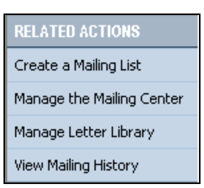


You also have the option of creating a receipt that doubles as an acknowledgement (or thank you letter) for the donations. If you do so, you can check the box labeled **Receipts are also used as our Thank You Letters** on the Finish Mailing step. This marks the donations as acknowledged when the receipt is sent.

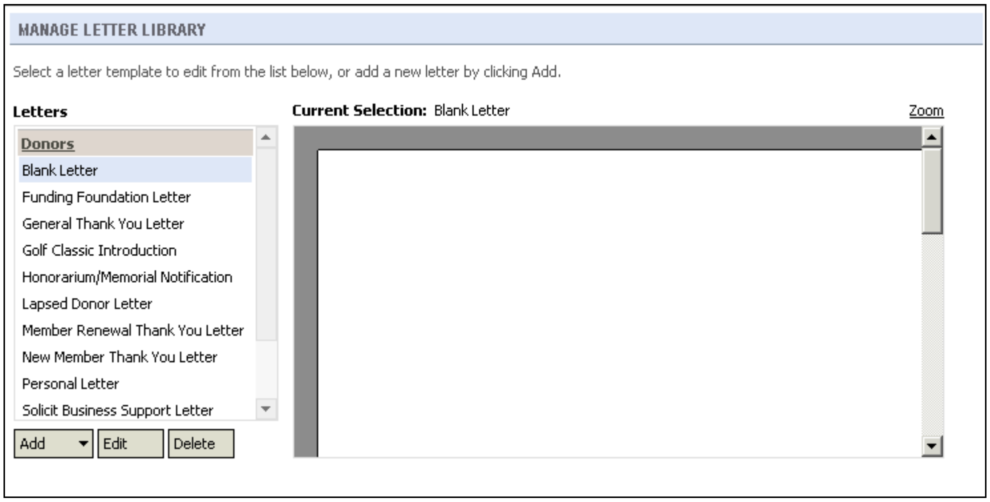
Donor Letters

Donor letters must be sent to a donor or list of donors. The fields available to insert into a donor letter are primarily donor fields, but you can also insert summary donation information, donor and donation custom fields, and information about your organization.

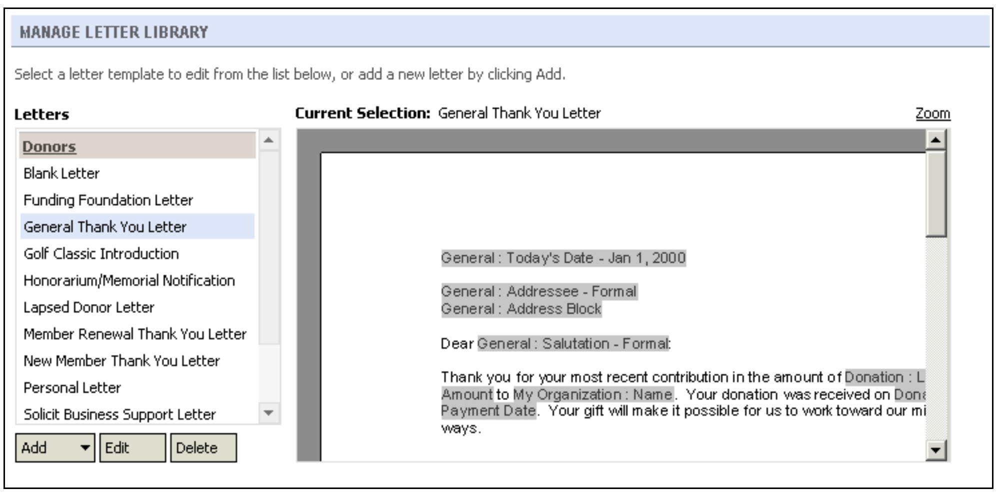
To add a donor letter, click **Manage Letter Library** in **Related Actions** on the main Mailings screen.



Then click the **Add** button and select **Add Letter for Donors**.



To edit a donor letter, click **Manage Letter Library** in **Related Actions** on the main Mailings screen. Then select the donor letter you want to edit and click the **Edit** button.

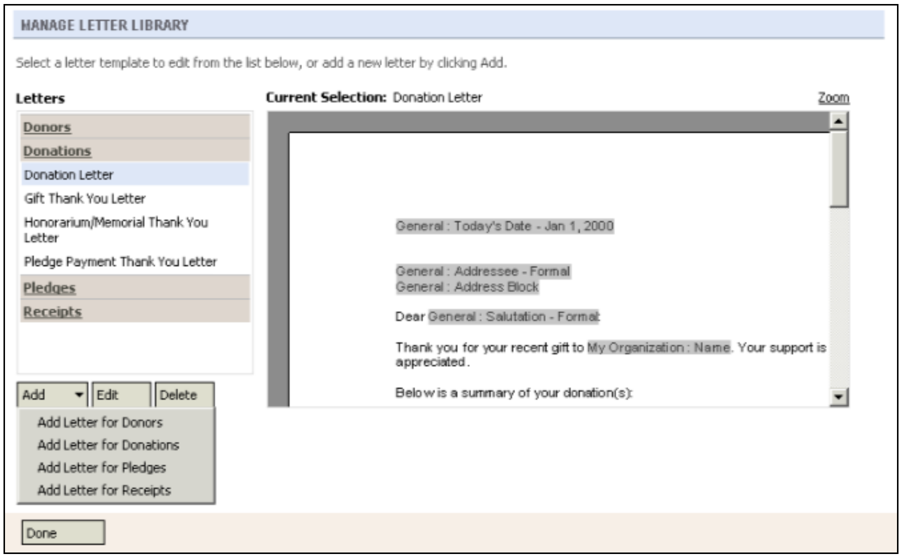


Donation Letters

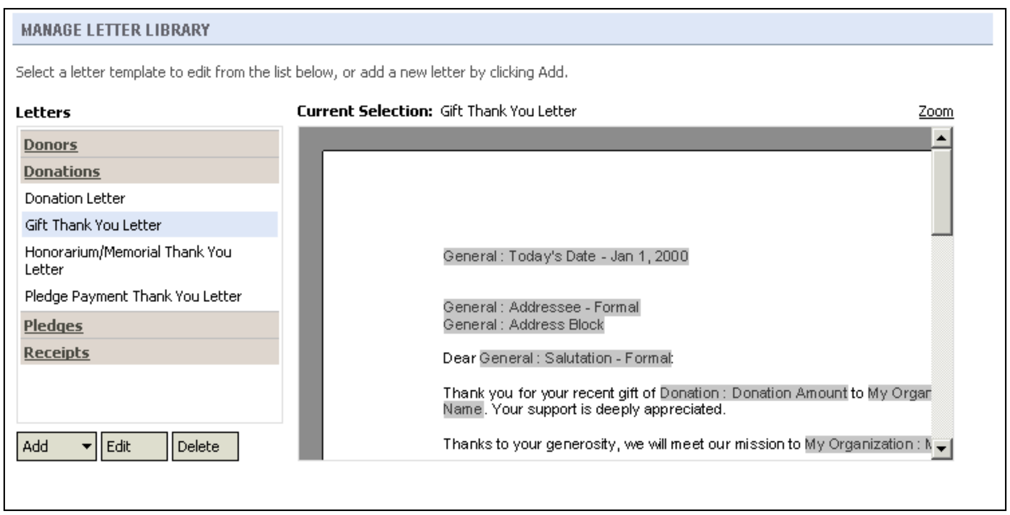
Donation letters must be sent for a donation or list of donations. Donation letters are available to choose as the letter for the Donation Thank You Letters Donation Mailing.

You can insert all available donor fields in a donation letter. You can also insert information about the specific donations in the list, as well as donation summary information, donor and donation custom fields, and information about your organization.

To add a donation letter, click **Manage Letter Library** in **Related Actions** on the main Mailings screen. Then click the **Add** button and select **Add Letter for Donations**.



To edit a donation letter, click **Manage Letter Library** in **Related Actions** on the main Mailings screen. Then select the donation letter you want to edit and click the **Edit** button.



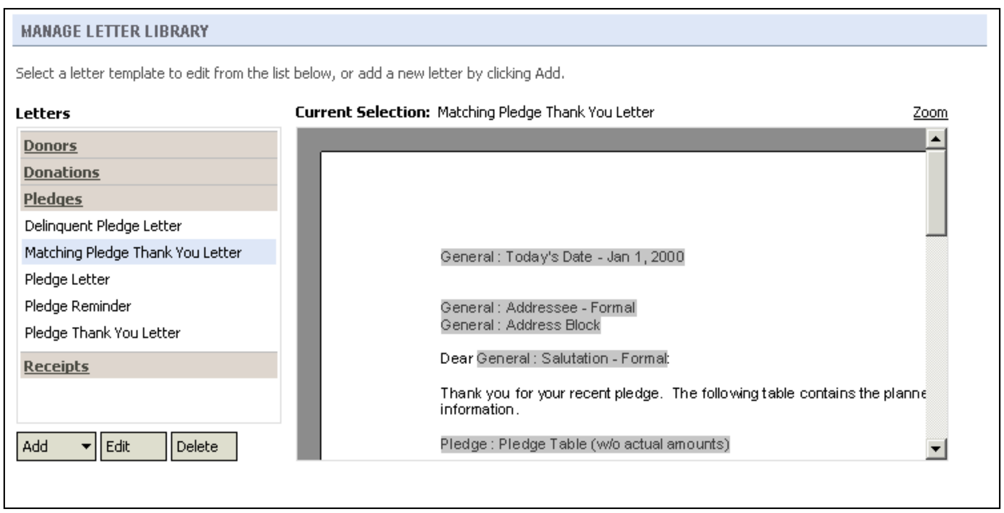
Pledge Letters

Pledge letters must be sent for a pledge or list of pledges. Pledge letters are available to choose as the letter for the Pledge Thank You Letters and Matching Pledge Thank You Letters Donation Mailings.

You can insert all available donor fields in a pledge letter. You can also insert information about the specific pledges in the list, as well as donation summary information, donor and donation custom fields, and information about your organization.

To add a pledge letter, click **Manage Letter Library** in **Related Actions** on the main Mailings screen. Then click the **Add** button and select **Add Letter for Pledges**.

To edit a pledge letter, click **Manage Letter Library** in **Related Actions** on the main Mailings screen. Then select the pledge letter you want to edit and click the **Edit** button.

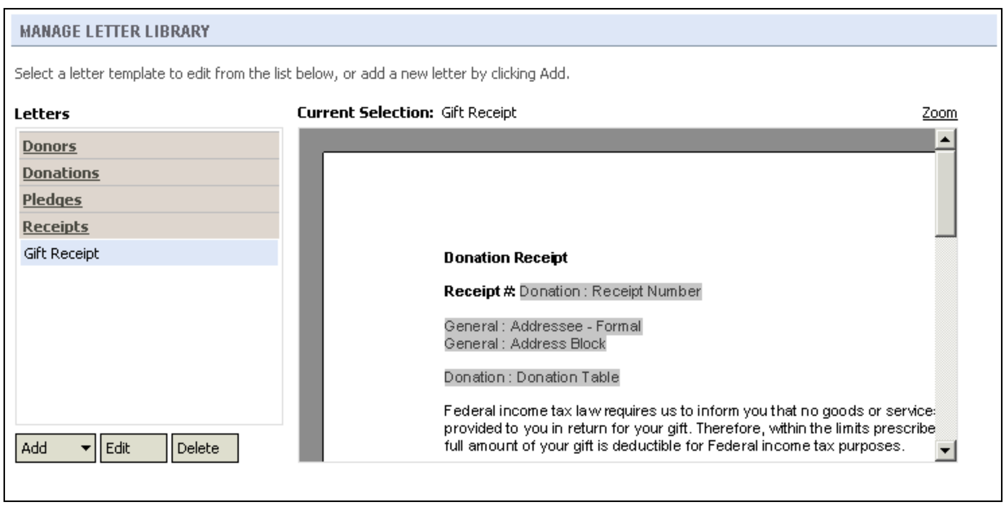


Receipts
Receipts are sent to your donors as tax receipts for their donations. Receipts can only be used for the Donation Receipts Donation Mailing.

You can insert all available donor fields in a receipt. You can also insert information about the specific donations in the list, as well as donation summary information, donor and donation custom fields, and information about your organization.

To add a receipt, click **Manage Letter Library** in **Related Actions** on the main Mailings screen. Then click the **Add** button and select **Add Letter for** Receipts.

To edit a receipt, click **Manage Letter Library** in **Related Actions** on the main Mailings screen. Then select the receipt you want to edit and click the **Edit** button.

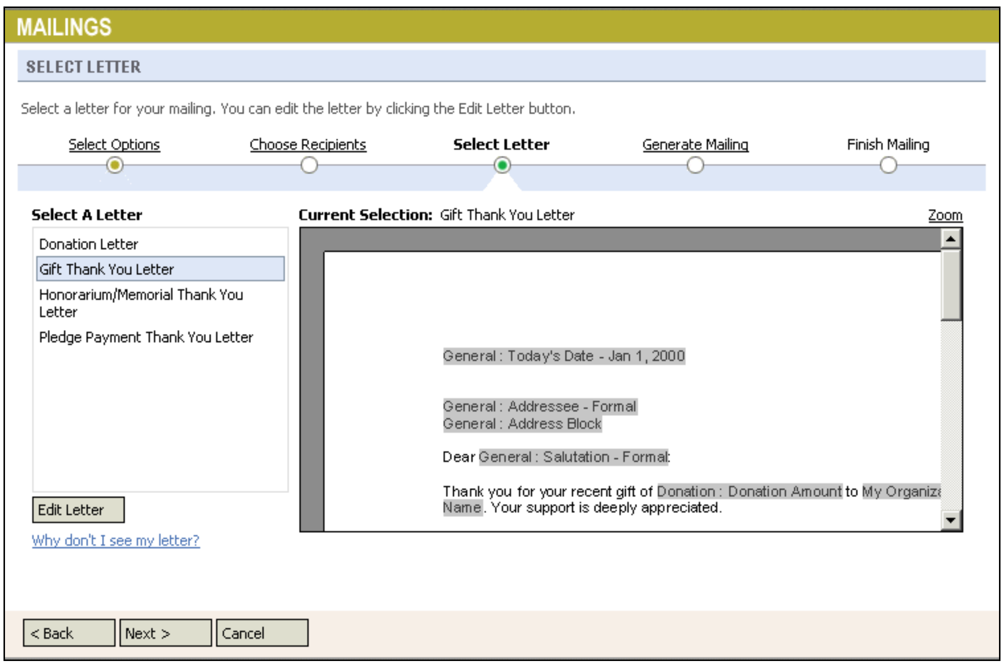


Donation Thank You Letters

When you add donations into GiftWorks, there is an acknowledgement step that includes the option of adding the donation to the Thank You Letters mailing list. Donations added to the list are automatically queued for sending.

When you are ready to send the thank you letters, go to the main Mailings page and click the **Donation Thank You Letters** donation mailing at the top right of the main work area.

This takes you into the mailing process for the thank you letters. You can create or modify the letter template set to be used as the thank you letter for this mailing. Please note: only a donation-type letter can be used for the Donation Thank You Letters mailing.



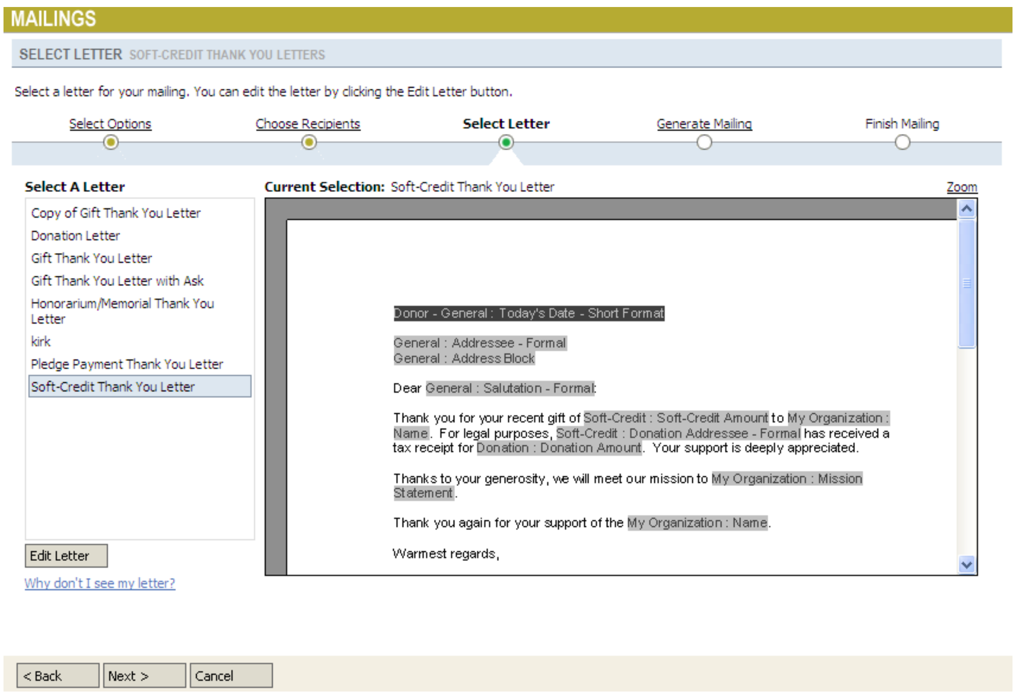
On the Finish Mailing step of the mailing process, you have the option of marking the donations in the list as acknowledged by the sending of this mailing. This automatically marks each donation as acknowledged with the details of the mailing, and removes the donations from the Donations Thank You Letters mailing.

Soft-Credit Thank You Letters

When you add a soft-credit into GiftWorks, there is an acknowledgement step that includes the option of adding the soft-credit to the Soft-Credit Thank You Letters mailing list. Sof-Credit Donations added to the list are automatically queued for sending.

When you are ready to send the thank you letters, go to the main Mailings page and click the Soft-Credit **Thank You Letters** donation mailing at the top right of the main work area.

This takes you into the mailing process for the soft-credit letters. You can create or modify the letter template set to be used as the thank you letter for this mailing. Please note: only a donation-type letter can be used for the Soft-Credit Thank You Letters mailing.

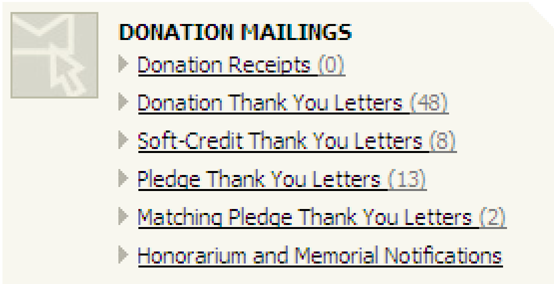


On the Finish Mailing step of the mailing process, you have the option of marking the donations in the list as acknowledged by the sending of this mailing. This automatically marks each donation as acknowledged with the details of the mailing, and removes the donations from the Soft-Credit Thank You Letters mailing.

Pledge Thank You Letters

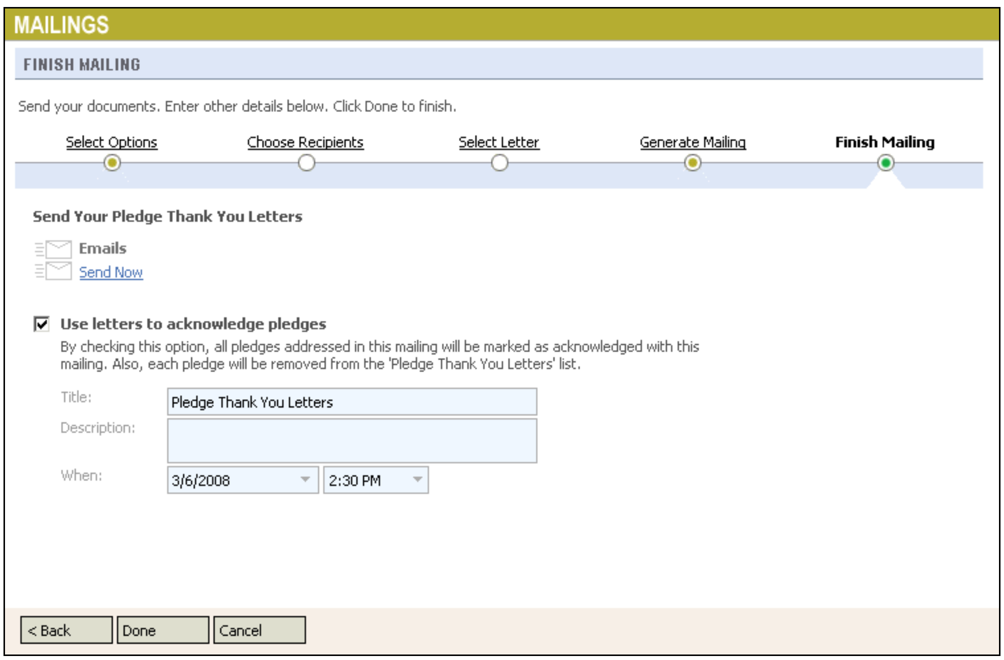
When you add pledges into GiftWorks, there is an acknowledgement step that includes the option of adding the pledge to the Thank You Letters mailing list. Pledges added to the list are automatically queued for sending.

When you are ready to send the thank you letters, go to the main Mailings page and click the **Pledge Thank You Letters** donation mailing at the top right of the main work area.



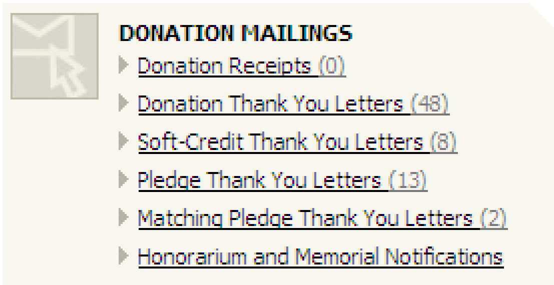
This takes you into the mailing process for the thank you letters. You can create or modify the letter template set to be used as the thank you letter for this mailing. Please note that only a pledge-type letters can be used for the Pledge Thank You Letters mailing.

On the Finish Mailing step of the mailing process, you have the option of marking the pledges in the list as acknowledged by the sending of this mailing. This automatically marks each pledge as acknowledged with the details of the mailing, and removes the pledges from the Pledges Thank You Letters mailing.



Matching Pledge Thank You Letters
When you enter donations into GiftWorks that are going to be matched by another donor (an employer, for example), you can automatically create a pledge for the matching donor. These matching pledges can then be optionally added to the Matching Pledge Thank You Letters mailing.

When you are ready to send the thank you letters, go to the main Mailings page and click the **Matching Pledge Thank You Letters Donation Mailing** at the top right of the main work area.

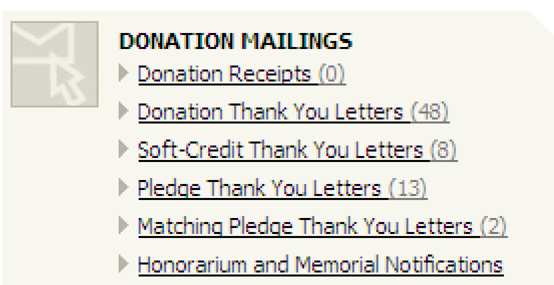


This takes you into the mailing process for the thank you letters. You can create or modify the letter template set to be used as the thank you letter for this mailing. Please note that only a pledge-type letter can be used for the Pledge Thank You Letters mailing.

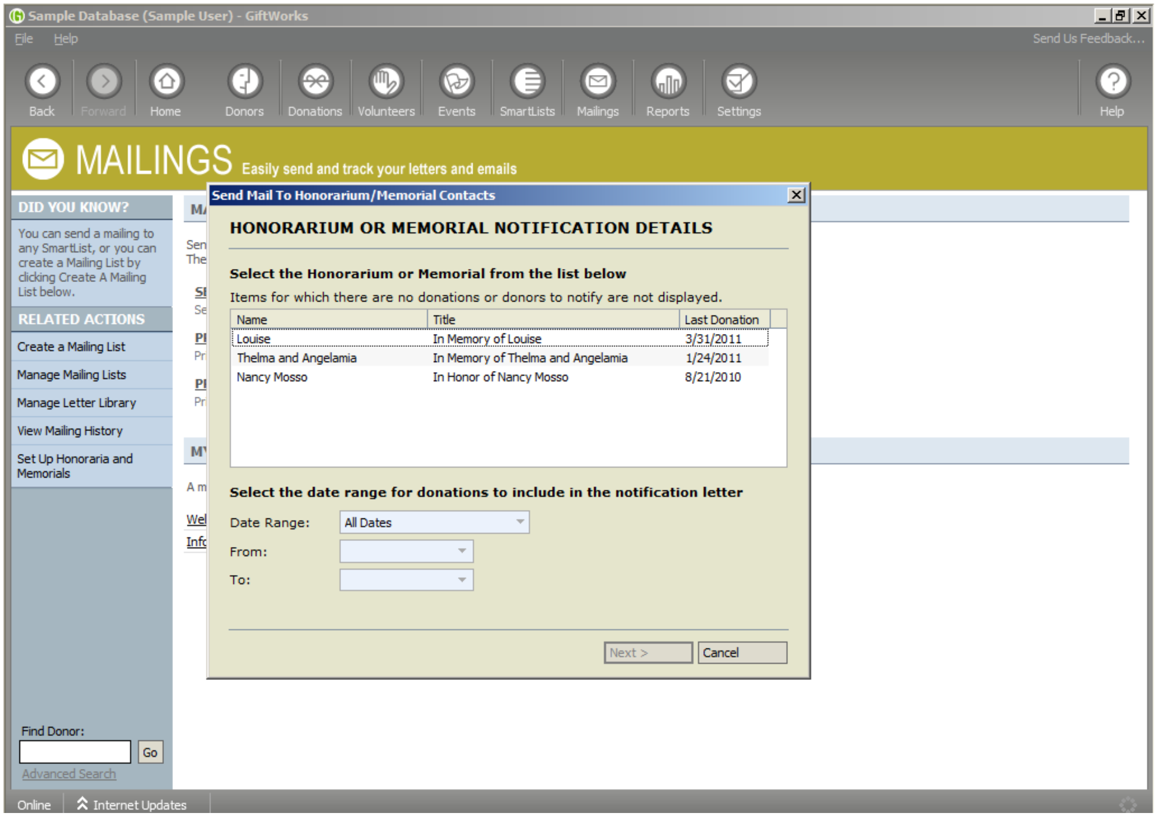
On the Finish Mailing step of the mailing process, you can choose to record the details of the mailing in each donor’s record. Each pledge will also automatically be removed from the Matching Pledges Thank You Letters mailing.

Honorarium and Memorial Notifications
Once set up, a notification will be added to the Honorarium and Memorial Notifications for each donation received to the honorarium or memorial, and for each donor (family members, for example) that you indicated wants to be notified of new donations.

When you are ready to send notifications, go to the main Mailings page, and click on **Honorarium and Memorial Notifications** at the top right of the main work area.

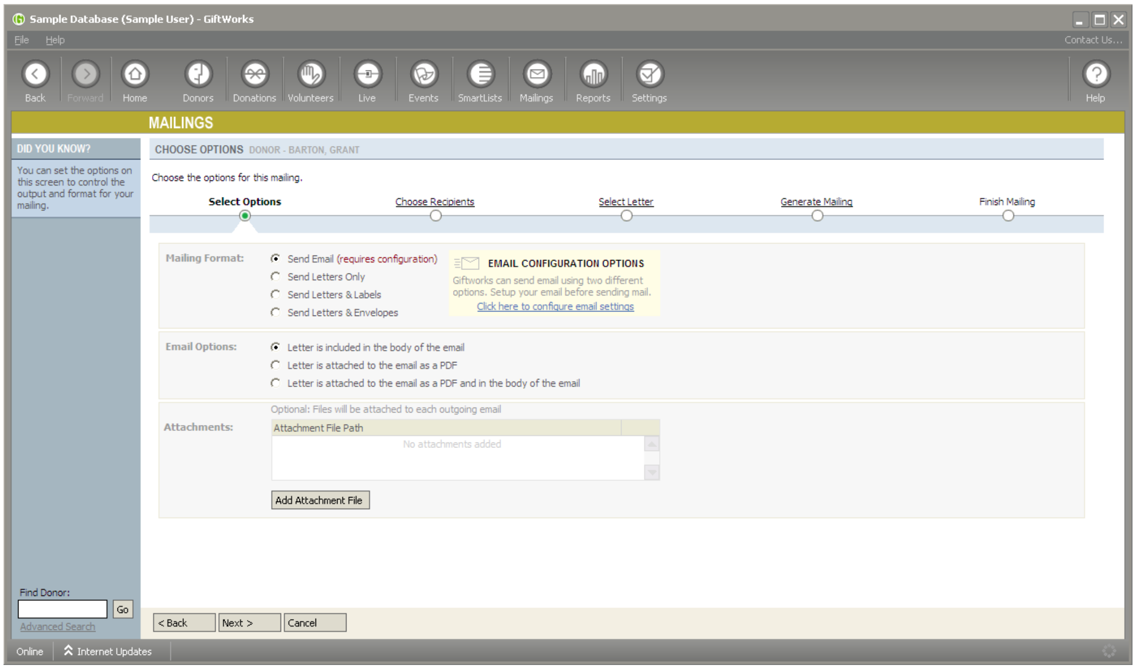


Next, choose an honorarium or memorial from the list. You can now also specify the Date Range for the donations.

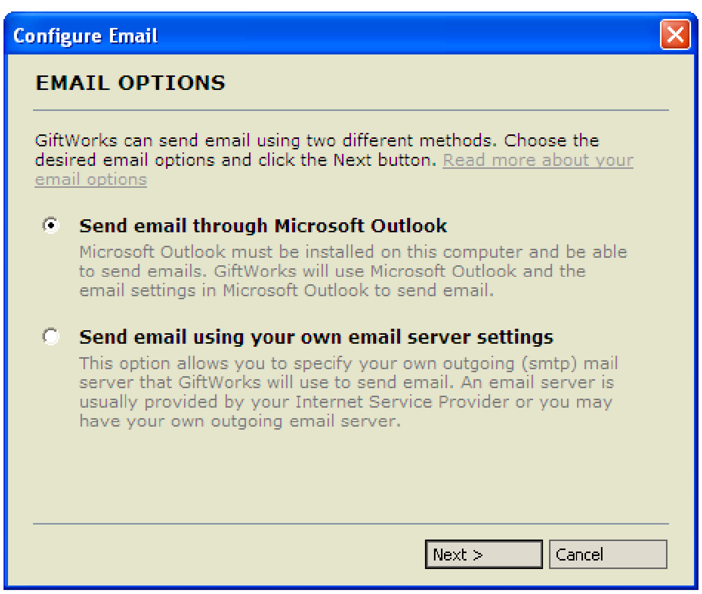


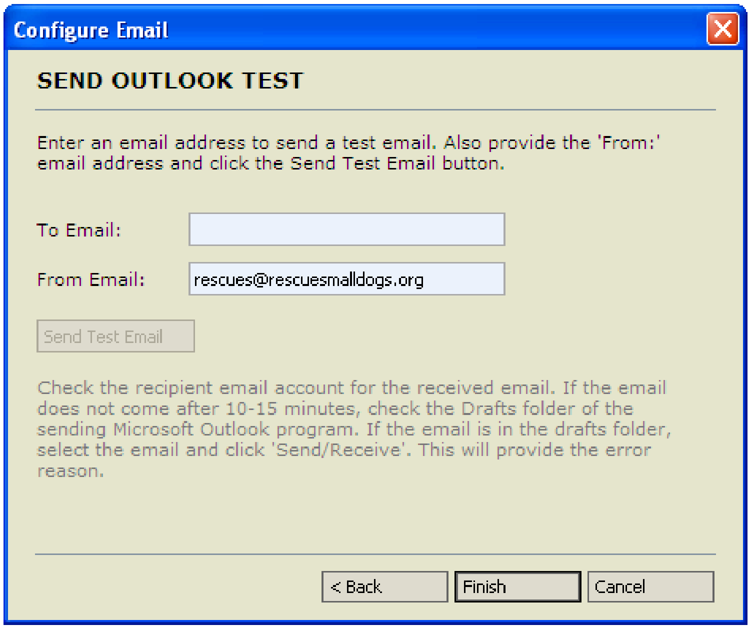
You can create or modify the letter template set to be used as the notification for this mailing. Please note: only a donor letter can be used for the notification mailing.

Email Communication Improvements: Flexible options are available for configuring email to work with GiftWorks. In the past, users were required to have Microsoft Outlook installed on any computer they wanted to use to send email from GiftWorks during the mailing process. Now, users will be able to choose to send email using Microsoft Outlook or by configuring standard email settings to use their outgoing mail server. Configuring these standard email settings will be similar to what users have experienced when setting up any email client.
Using your own Outgoing Mail Server allows the emails to go to that server to be sent out, which frees up GiftWorks.
**All Users must configure

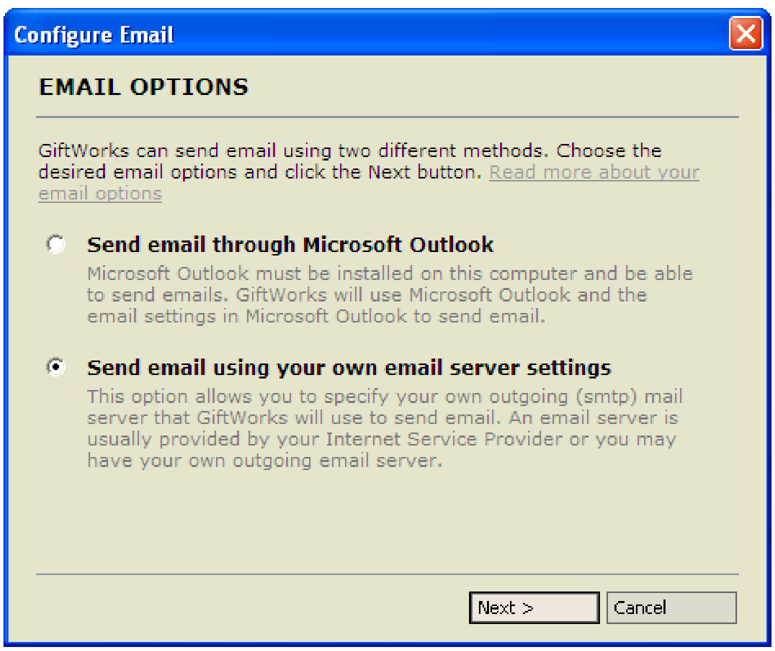


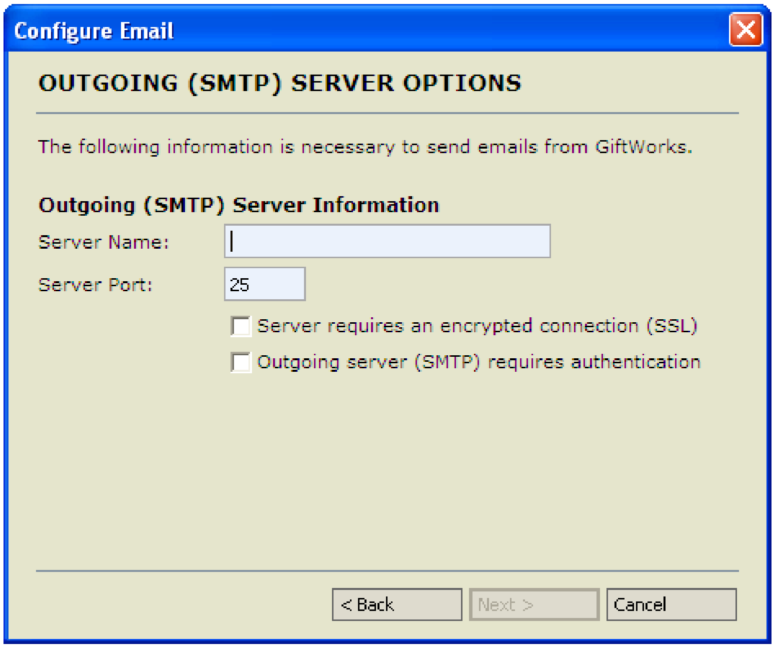
To use Outlook:





To use your own mail server:





GiftWorks 2012 allows you to send email in one of two ways. The first option uses Microsoft Outlook, which previous versions of GiftWorks already supported. The second option is new, and allows you to send email through GiftWorks by configuring standard email settings to use your outgoing email server. This is similar to what you experience when setting up most email clients (like Microsoft Outlook Express, Mozilla Thunderbird, Eudora, Pegasus Mail, etc).

Send email using Outlook

Using Outlook, GiftWorks creates an email and transmits that email to Outlook. Outlook is then responsible to send the email to your mail server, which will then deliver the email to your recipients. This option appears to be very fast in GiftWorks because the bulk of the work is done by Outlook. Let's say that it takes 45 seconds to send an email with a large attachment. The time it takes GiftWorks to create the email and transmit it to Outlook might be one second. The time it takes Outlook to send the email would be the remainder of the 45 seconds. Once GiftWorks creates the email and transmits it to Outlook, you can continue to use GiftWorks because its portion of the job has completed.

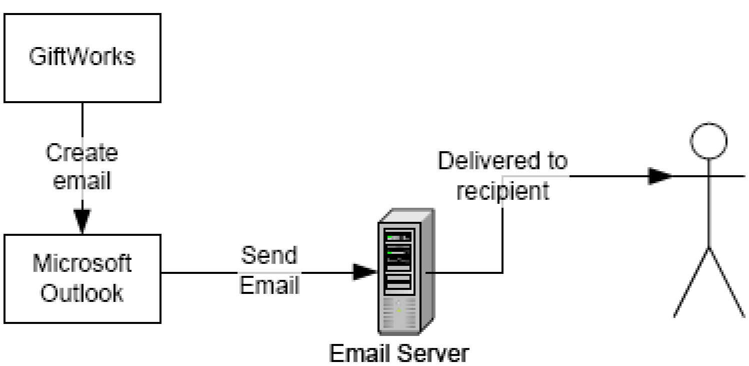


Figure 1: Sending emails using outlook

Send e-mail using your outgoing email server

Using the outgoing email server option, GiftWorks creates the email as well as sends the email to your outgoing mail server. This eliminates the need for Outlook and allows you to send emails with whatever

email server you would like to use. In most cases this option will be configured using the outgoing email server of your internet service provider (ISP). Your ISP can provide the settings necessary to configure GiftWorks, which include the following: email server address, server port, if the server requires Secure Socket Layers or SSL, and if the server requires authentication along with the username and password if necessary.

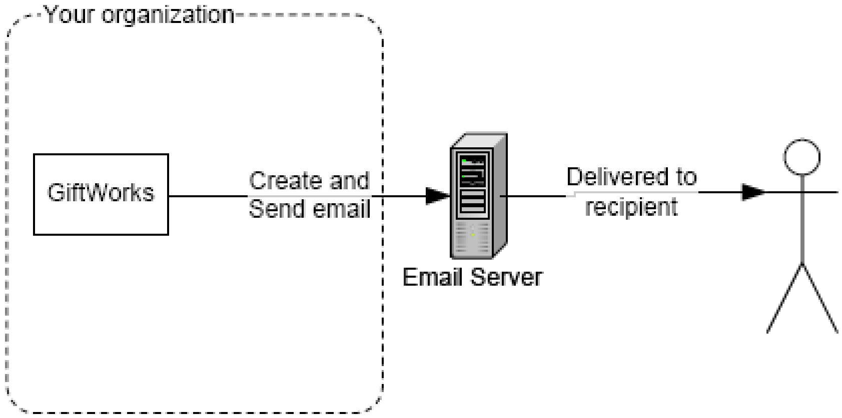


Figure 2: Sending email using an outside email server

You might also have an internal mail server that is responsible for sending your organization's emails. In the same way, GiftWorks can be configured to use this server. Your organization’s technology person will be able to provide the settings necessary to configure GiftWorks, which include the following: email server address, server port, if the server requires Secure Socket Layers or SSL, and if the server requires authentication along with the username and password if necessary.

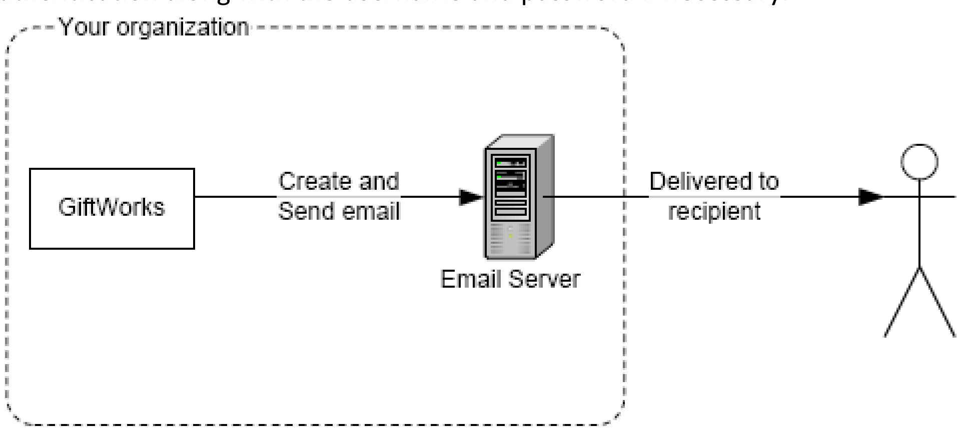


Figure 3: Sending email using an internal email server

As you can see, there is not much difference between Figure 2 and Figure 3. The main difference is that in Figure 2 GiftWorks is communicating with an email server that is outside of your organization's network and in Figure 3 the email server is inside your organization's network.
What does that mean to you? We can relate this to copying files to different locations. If you copy a large file from one folder on your computer to another folder on your computer it copies very fast since the file is copying from one location on your hard drive to another. This example is similar to the email configuration using Outlook. If you copy a large file from your computer to a different computer or server within your organization, it's still pretty fast, but not as fast as the previous example. This example is similar to the email configuration using your organization’s internal email server. If you copy a large file to a website or to a server outside of your organization it will be much slower than the

previous two examples. This is because the file is leaving your internal network and going to some external location. This example is similar to the email configuration using an outgoing email server that is not located within your organization (i.e. Internet Service Provider, etc).

Let's relate this to the example provided in the Outlook section using a large attachment. With an internal email server it will be almost as fast as using Outlook. Using an outside email server, it would still take GiftWorks one second to create the email, but it may take up to 45 seconds per recipient to send the email to the configured mail server. GiftWorks will remain on the mailing screen until the email is successfully sent to the mail server.

Other outgoing email server options

If your organization does not have an internal email server or you aren't allowed to or don't want to use the outgoing email server of your internet service provider, there are other options. Some sites allow free use of their email servers with certain restrictions. A few of those options are listed below in no particular order.

This information was gathered on September 1st, 2011 and may be different depending on when you are reading this.

	SendGrid	MailJet	JangoSmtp	Gmail
Website	http://sendgrid.com	http:// MailJet.com	http:// jangosmtp.com	http://gmail.com
Cost	Free	Free	Free	Free
Free Email Limit Paid options available	200 per day	200 per day	50 per month – can be increased to 200 per month upon request	500 per day Sending Limits
Server address	Smtp.sendgrid.com	In.mailjet.com	Relay.jangosmtp.net	Smtp.gmail.com
Server port	25, 465, or 587	25 or 587	587	587
Use SSL		Yes	Yes	Yes
Authentication	Username/password used to create account	Username/password provided by MailJet	Username/password provided by JangoSmtp	Gmail account username/password
Tracking	sent to, from, subject, date	sent to, from, subject, date	sent to, from, subject, date	sent to, from, subject, date, email body
From Address	Any	Any	Any	Any, but from address will be replaced with the from address configured in the gmail account

There are also some other options for internal email servers. We would recommend having a technology professional setup and configure these applications.

MailEnable

http://www.mailenable.com/standard_edition.asp

Can be used as a full SMTP server or to relay emails to another outgoing email server

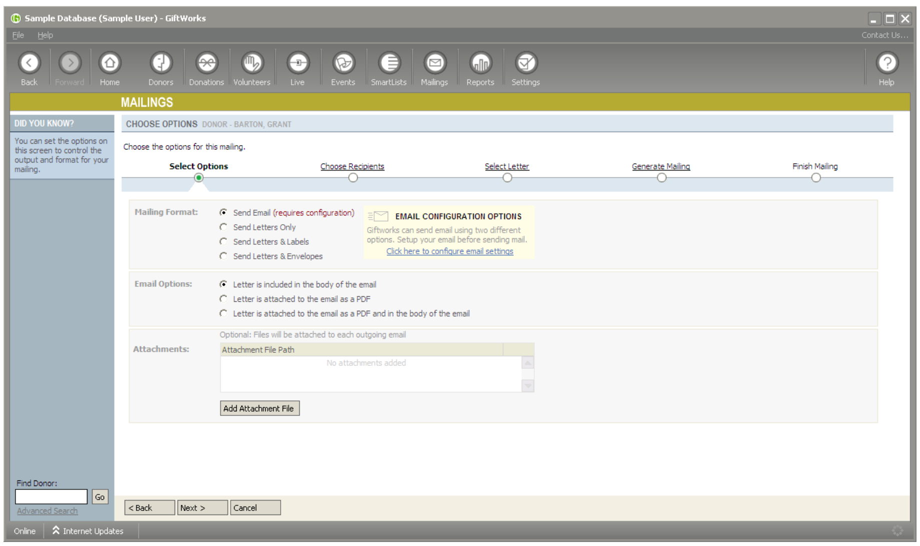
To configure MailEnable to relay emails through another outgoing email server:

Open the MailEnable Administrator and go to Server -> LocalHost -> Connectors -> SMTP (right-click and select properties), click the SmartHost Tab.

Set IP/Domain to the email server address, port, and authentication as provided by either the free email server table above or the administrator of the email server you are using.
Make sure the Domain Smart Hosting takes priority is checked
Mission Research will not be able to help setup MailEnable, so please consult MailEnable documentation/support for detailed configuration steps/questions

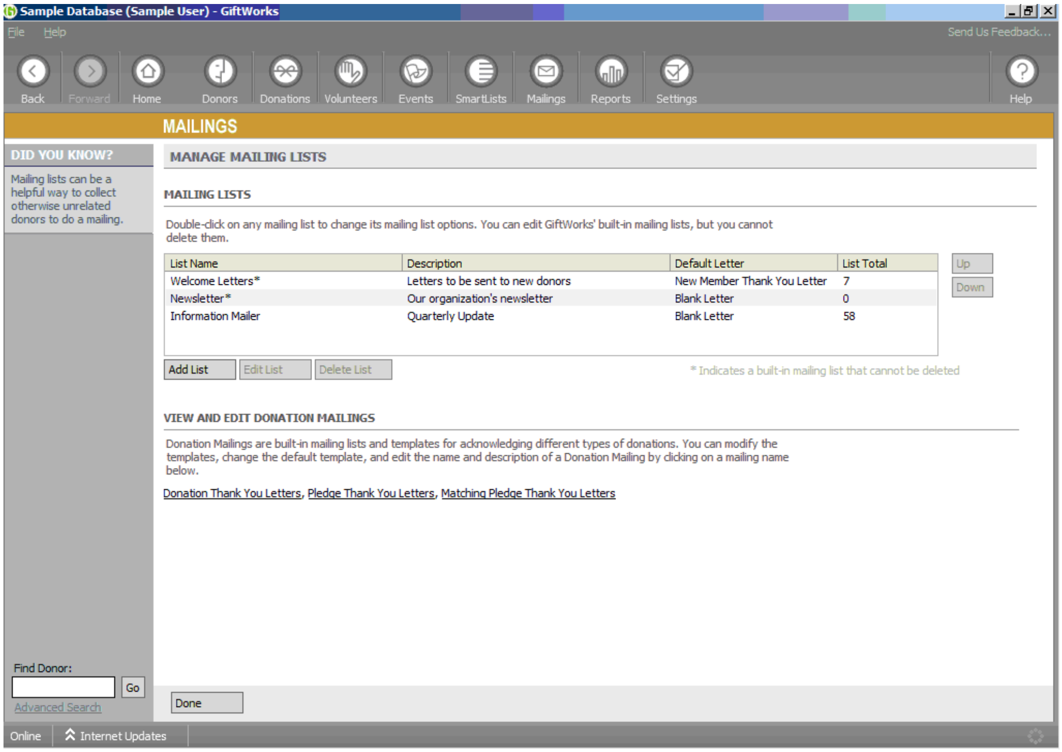
Microsoft IIS – SMTP
See Microsoft documentation for setting up and configuring this product.

Email Options:
Letter is included in the body of the email
Letter is attached to the email as a PDF
Letter is attached to the email as a PDF and in the body of the email



MANAGING THE MAILING CENTER

To manage the Mailing Center, **click Manage Mailing Lists** in the **Related Actions** menu on the main Mailings screen. Mailing Lists are on the top half and Donation Mailings are listed on the bottom half of the Manage Mailing Lists screen. Click any donation mailing to view or edit the settings for that mailing.



When viewing or editing a donation mailing, there are two tabs listed at the top of the screen: Details and Donations/Pledges.

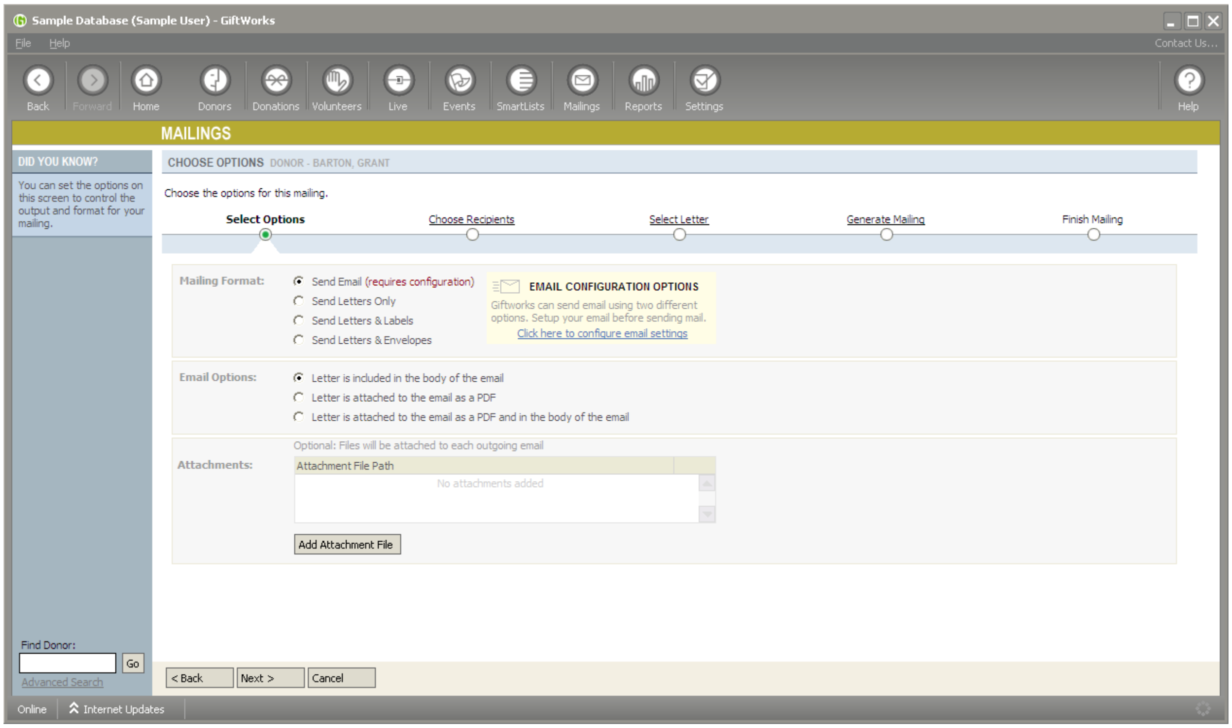
The **Details** tab shows the name and description of the donation mailing, as well as the name of the currently selected letter template for that mailing. To choose a different letter template, or to view the current template, click **Select Letter**. The next screen shows the currently selected template, as well as other appropriate letter templates for this mailing. You can add, edit, or delete a template by clicking the appropriate button. Click **Ok** to save your changes, or **Cancel** to return to the donation mailing without saving your changes.

The **Donations/Pledges** tab shows all donations or pledges currently queued to receive the donation mailing. Use the links at the top right of the list area to **Check** or **Uncheck** all items in the list. You can also click individual boxes to the left of items to select them, then use the **Remove** button to remove those items from the donation mailing. There is also a Print link at the top right to print the list of items.

When you are done viewing or editing the donation mailing, click **Done** to return to the previous screen.

UNDERSTANDING THE MAILING PROCESS

When you send a mailing (letter or email) using GiftWorks, you will always go through the same five main steps of the process, with minor variations depending on what you're sending. The five steps appear below.

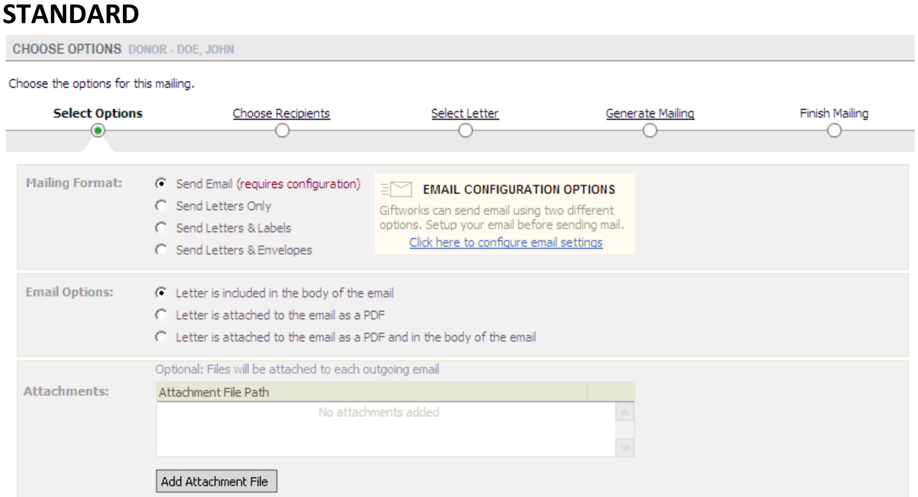


You can move back and forth through the mailing process by using the **Back** and **Next** buttons at the bottom left of the main work area. You can also skip to any main step of the mailing process by clicking the underlined step names listed across the top of the main work area.

Select Options

This step lets you choose some basic options for your mailing.

STANDARD



Mailing Format: Choose to send emails, just letters, or letters with labels or envelopes.

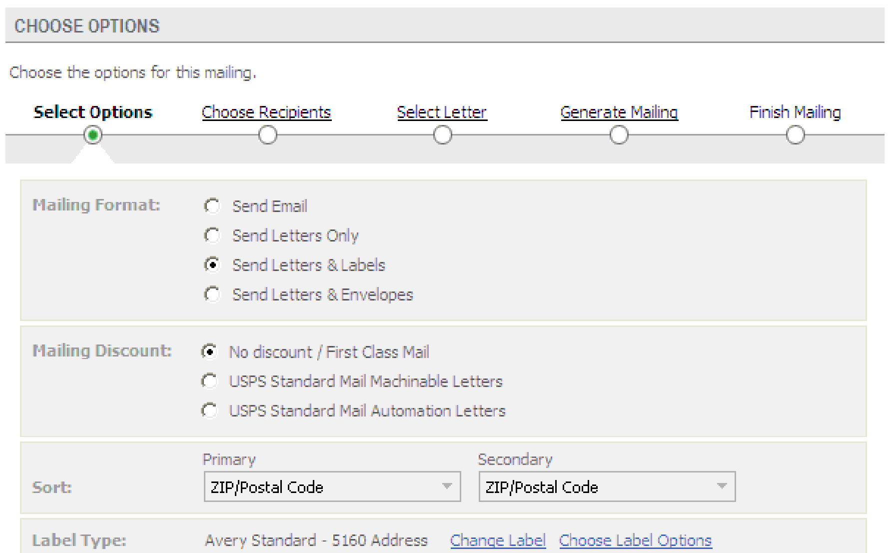
Label/Envelope Type: If you are creating labels or envelopes as part of your mailing, choose the type of label or envelope and set or change the label/envelope options by clicking the available links.

Sort: Choose a primary and secondary sort for the documents. For example, if you choose ZIP/Postal Code as primary and Display Name as secondary, the mailing documents will be generated in ZIP Code order, then in alphabetical order for recipients who are in the same ZIP Code.

Recipients: Some mailing types give you recipients options on the options step of the mailing process. Choose whether to send one mailing per donation/pledge or to send one mailing per donor.

Attachment: If you are sending an email, you can choose one file to attach to the outgoing emails. Click the **Browse** button to locate the file. Click the **Reset** button to remove the attachment.

PREMIUM



Mailing Format: Choose to send emails, just letters, or letters with labels or envelopes.

Mailing Discount: If your mailing has more than 200 pieces and meets weight and shape standards, the mailing may qualify for discounted rates. Choose whether to send the mailing with No discount/First Class Mail, USPS Standard Mail Machinable Letters or USPS Standard Mail Automation Letters. GiftWorks Premium will automatically sort addresses, print postal sortation tray labels and print the necessary information to complete postage statements for USPS discounted mailings.

Label/Envelope Type: If you are creating labels or envelopes as part of your mailing, choose the type of label or envelope and set or change the label/envelope options by clicking the available links.

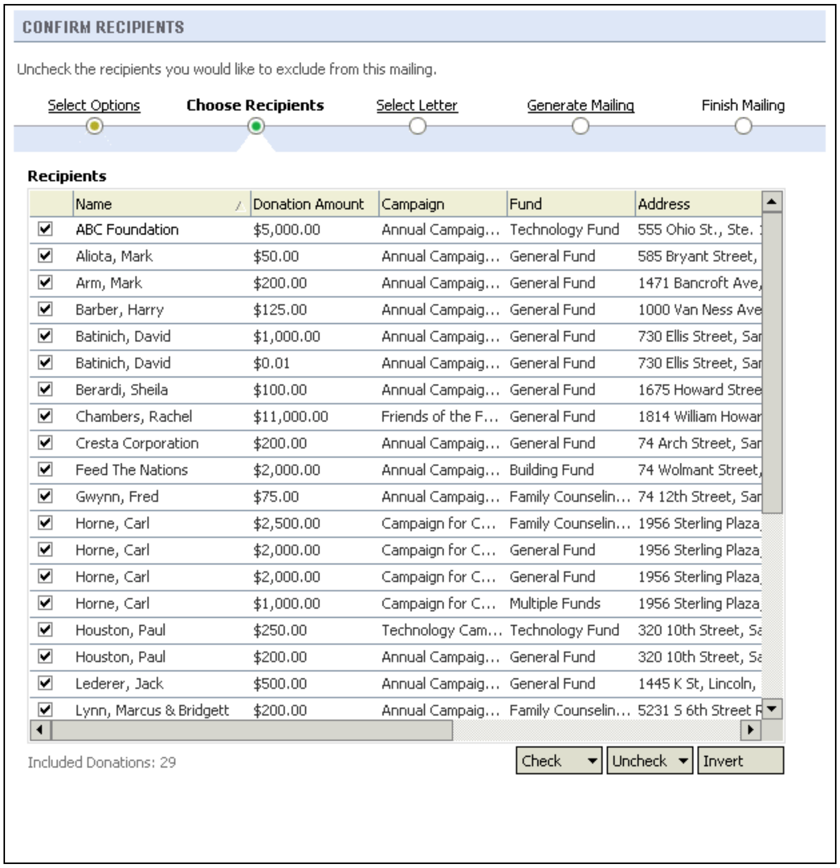
Sort: Choose a primary and secondary sort for the documents. For example, if you choose ZIP/Postal Code as primary and Display Name as secondary, the mailing documents will be generated in ZIP Code order, then in alphabetical order for recipients who are in the same ZIP Code.

Recipients: Some mailing types give you recipients options on the options step of the mailing process. Choose whether to send one mailing per donation/pledge or to send one mailing per donor.

Attachment: If you are sending an email, you can choose one file to attach to the outgoing emails. Click the **Browse** button to locate the file. Click the **Reset** button to remove the attachment.

Choose Recipients

This step lets you choose whether to send to all donors in the list for your mailing. There are buttons at the bottom right of the main work area that let you choose how to narrow the list.



GiftWorks provides a warning at the bottom left if there are recipients with incomplete or invalid addresses, recipients marked as deceased, do not mail, or do not email in their contact preferences, or, if sending a donation or pledge thank you letter, donations or pledges already marked acknowledged. The number of selected recipients is also indicated in the bottom left.

> **PREMIUM** GiftWorks will display a warning at the bottom of the screen if a seasonal address update has not been run on the current day.

Check button: Gives you the options of checking all recipients, checking every other recipient, checking every third recipient, checking the top 100 or 500 recipients, or choosing a number of recipients to check. If you have a large mailing (a large number of recipients and/or a large letter template), you may want to use one of these options to reduce the number of letters you generate at one time.

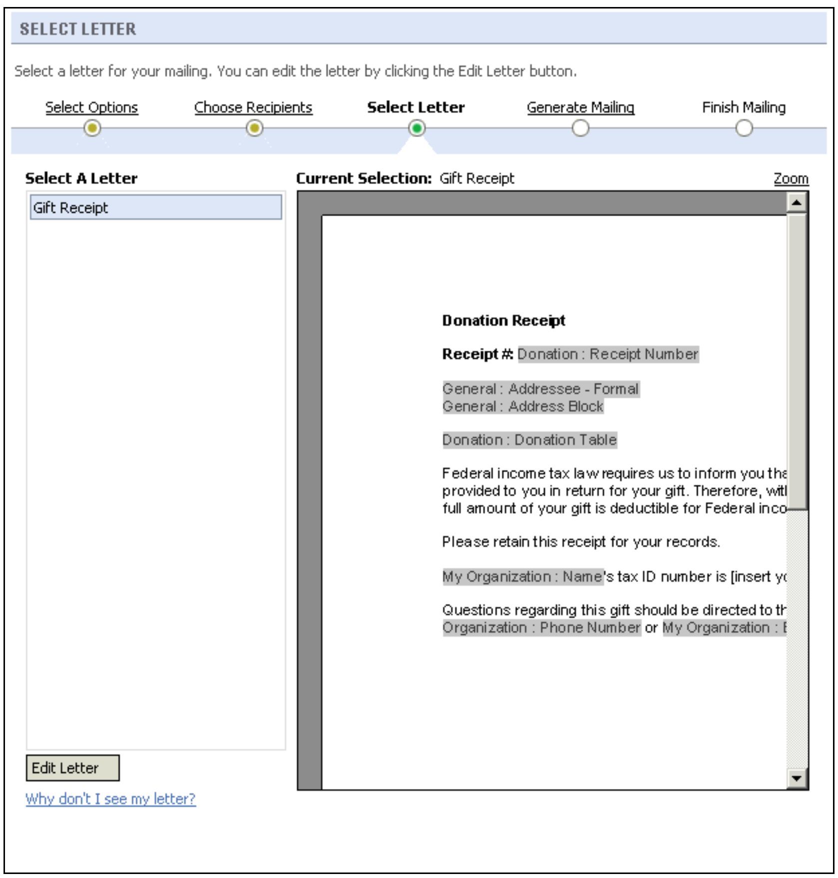
Uncheck button: Gives you the options of unchecking all recipients, unchecking all recipients with invalid addresses, unchecking recipients whose status is deceased, unchecking all recipients with any warning note, unchecking all recipients marked as ‘Do Not Mail’ or unchecking all recipients marked as ‘Do Not Solicit’. Choosing the **Uncheck all invalid** option automatically unchecks any recipients with invalid addresses or whose status is deceased.

**Note: a donor mailing has additional Uncheck options. These options are Uncheck members of included households, Uncheck members of included organizations, Uncheck households of included members and Uncheck organizations of included members.

Invert button: Reverses the currently selected recipients. If you have all recipients checked, the **Invert** button deselect them. If you have some recipients checked, this button will deselect those and select all other recipients.

Add button: A donor mailing will also include an Add button. This gives you the options of Add members of included households, Add members of included organizations, Add households of included members and Add organizations of included members.

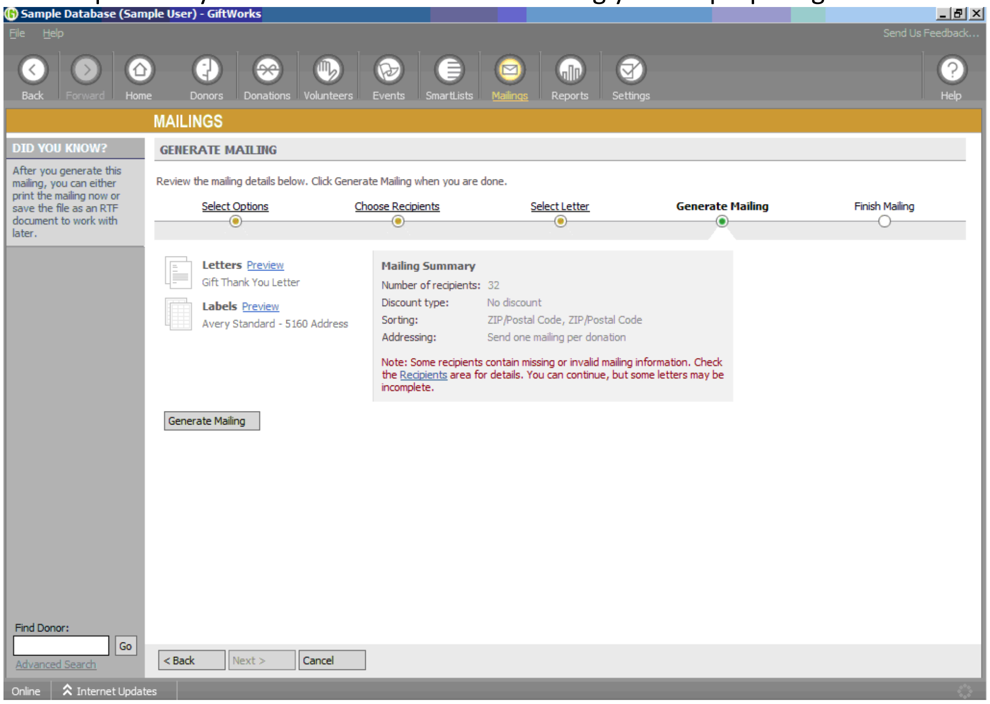
Select Letter
This step is where you choose the letter template you want to use for your mailing. The type of list you are sending to will determine which templates are available for your mailing. For example, if you are sending to a list of donors, you can only use a donor template.



If you want to edit the letter template before you send out the mailing, click the **Edit Letter** button at the bottom left of the main work area.

Generate Mailing

This step shows you information about the mailing you are preparing to send.



If you are sending letters (and envelopes or labels), you can preview the documents by clicking the **Preview** links. GiftWorks shows you what the documents will look like with the information from your database merged in. On the preview screen, use the **Prev** or **Next** buttons at the bottom right to move between pages of the document. Click **OK** to return to the Generate Mailing step.

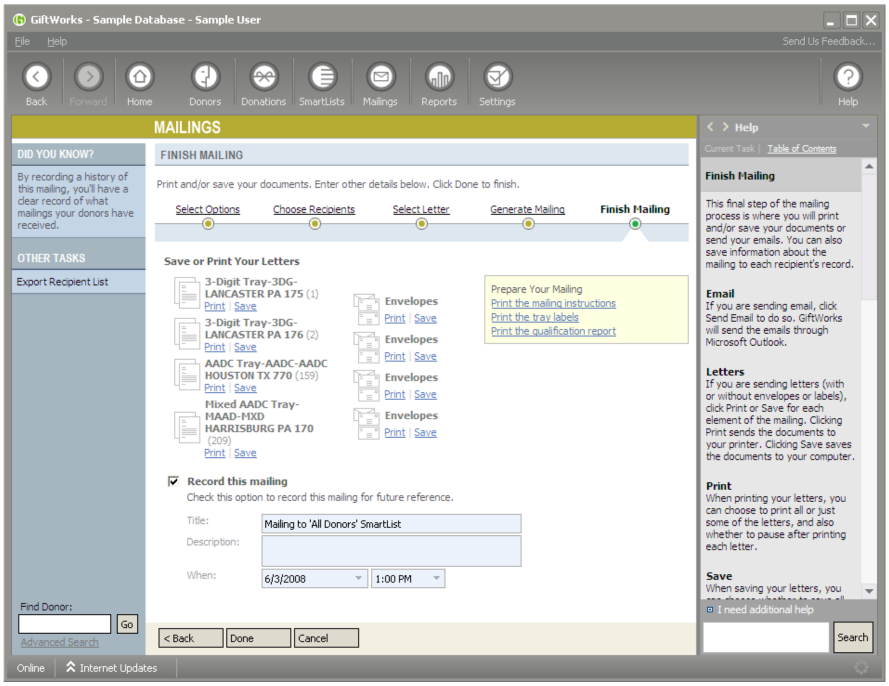
If you are sending an email, you can send a test email using the **Send Test Email** link. You will be prompted to enter an address to send the test email to, the name and address to send it from, and the subject to use for the test email.

The Mailing Options Summary box displays information about your mailing, including the number of recipients, sorting information, and whether you are sending one mailing per donor or per donation/pledge. Any warnings or errors with your mailing are displayed here as well. GiftWorks will notify you if there are any recipient problems (like incomplete or invalid information), or if the overall size of your mailing might cause problems. You can go back and correct these problems before you continue.

When you are ready to send your mailing, click the **Generate Mailing** button. If you are sending letters and labels or envelopes, this will prepare your documents for printing and saving. If you are sending emails, this will prepare your emails to be sent.

Finish Mailing
On this step, you will complete the sending of the mailing and choose options for recording it to the donor, donation, or pledge records.

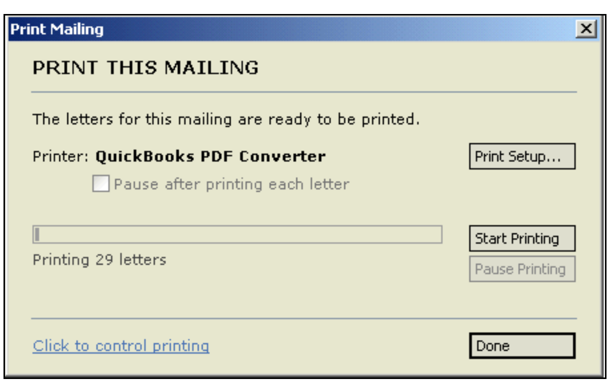
PREMIUM



Preparing Your Mailing
If you select to send your mailing as USPS Standard Mail Machinable or Automation Letters, make sure you:

- Print the labels for each postal sortation tray
- Print the qualification report, and
- Print the mailing instructions to complete the Postage Statement before taking the mailing to your Post Office.

PRINTING LETTERS, LABELS, OR ENVELOPES
If you are sending letters and labels or envelopes, there will be a **Print** link for each item. When you click the **Print** link, you will be presented with some options for the printing.



Click the **Print Setup** button to access the settings for the selected printer or to choose a different printer.

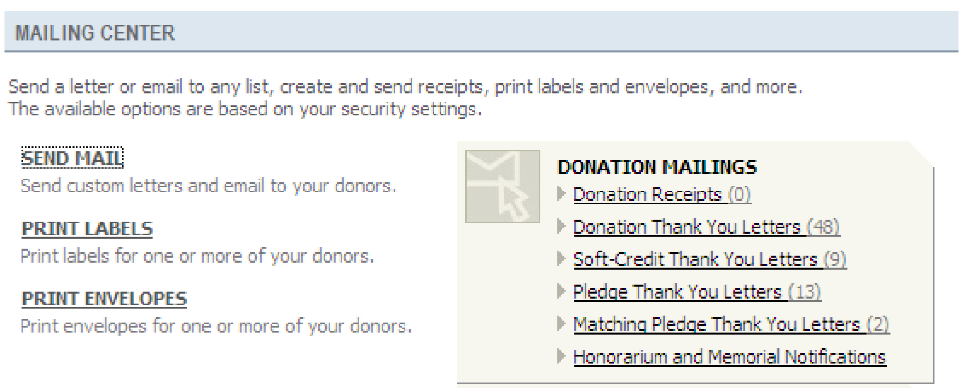
Checking the **Pause printer after each letter** box will cause a prompt to come up after each individual item is printed.

The **Start Printing** button starts the printing process with whatever options you have selected. Once printing has begun, you can pause it by clicking **Pause Printing**.

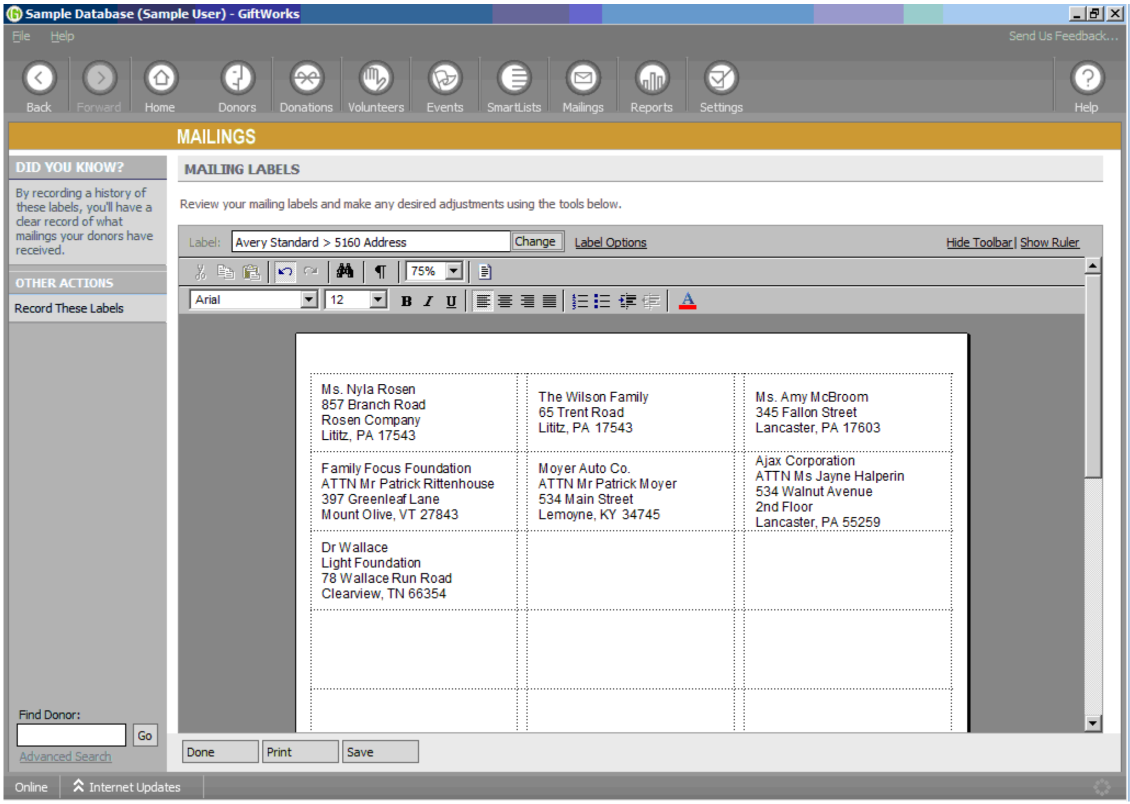
The **Click to control printing** link gives you additional options, including being able to select individual items or a number of items to print.

Click the **Done** button when you are finished.

Printing Labels
To print labels for a donor or list, click the **Print Labels** link on the main Mailings page. You can then choose to create labels for just one donor or for a list (SmartList or Mailing List). GiftWorks then creates your labels and displays them on the screen.



To choose a different label type, click the **Change** button at the top of the Mailing Labels screen. GiftWorks includes support for a wide variety of Avery labels, including most standard label sizes. See the size and layout details for the selected labels on the bottom half of the Select Mailing Label window. Click **OK** to return to the Mailing Labels screen.



To change label formatting, click the **Label Options** link and then choose Format Labels. On the Label Formatting Options screen, choose the database fields you want to insert into your labels by clicking the **Insert Field** button. The fields you select will be replaced by information from each recipient's record when your labels are created. To delete a field from the label, click that field and then click **Delete Field**. The database fields added to your label will appear in gray, surrounded by double angle brackets, like: <<Labels: Addressee - Formal>>.

To modify the font, use the buttons at the top right of the window. **Note: you must first highlight the fields and then choose the font. You can choose a specific font, and you can make text bold, italicized, or underlined. You can also choose a color for the text. The options you choose here will be applied to each label as it is generated. If you want to format individual labels, you can modify them in the main Labels window using the toolbar.

To set options for printing and sorting the labels, look on the bottom half of the Label Formatting Options screen. You can choose to print successive labels across or down the page, how to sort the labels, and, if you have a partially used sheet of labels, where on the sheet to start printing. Click **OK** when you have finished formatting your labels and setting options.

To show or hide the toolbar and ruler, click the links in the top right corner of the main work area of the main Mailing Labels screen. The toolbar contains buttons for formatting your labels, including font style, color and size, alignment, and bullet or outline formats. Change the formatting of any part of your label document using the toolbar. The ruler shows you the measurements of where your labels fall on the printed page.

When you are done making changes to your labels, click **Print** or **Save** at the bottom of the main work

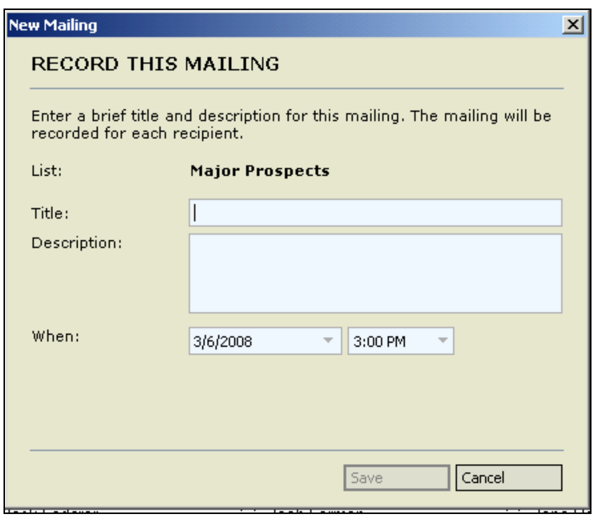
area. The **Print** button brings up the print options window. The **Save** button lets you choose a filename and location to save the labels document in rich text format (.rtf), which you can then open in Microsoft Word.

When you have finished printing or saving your labels, click the **Done** button to exit the Mailing Labels screen. GiftWorks will warn you if you have not recorded the labels.

Recording Labels

Record the printing of labels as a mailing in each recipient's record by clicking **Record These Labels** in the **Other Actions** menu.

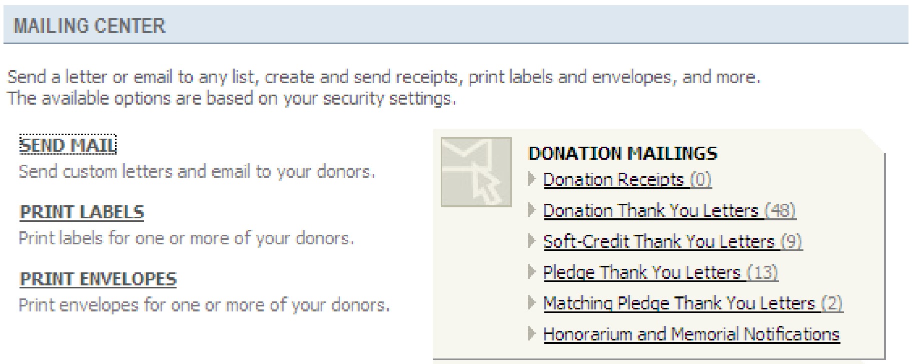
You might want to record labels, for example, if you are printing them to put on preprinted newsletters and you want a record that the newsletters were sent out.



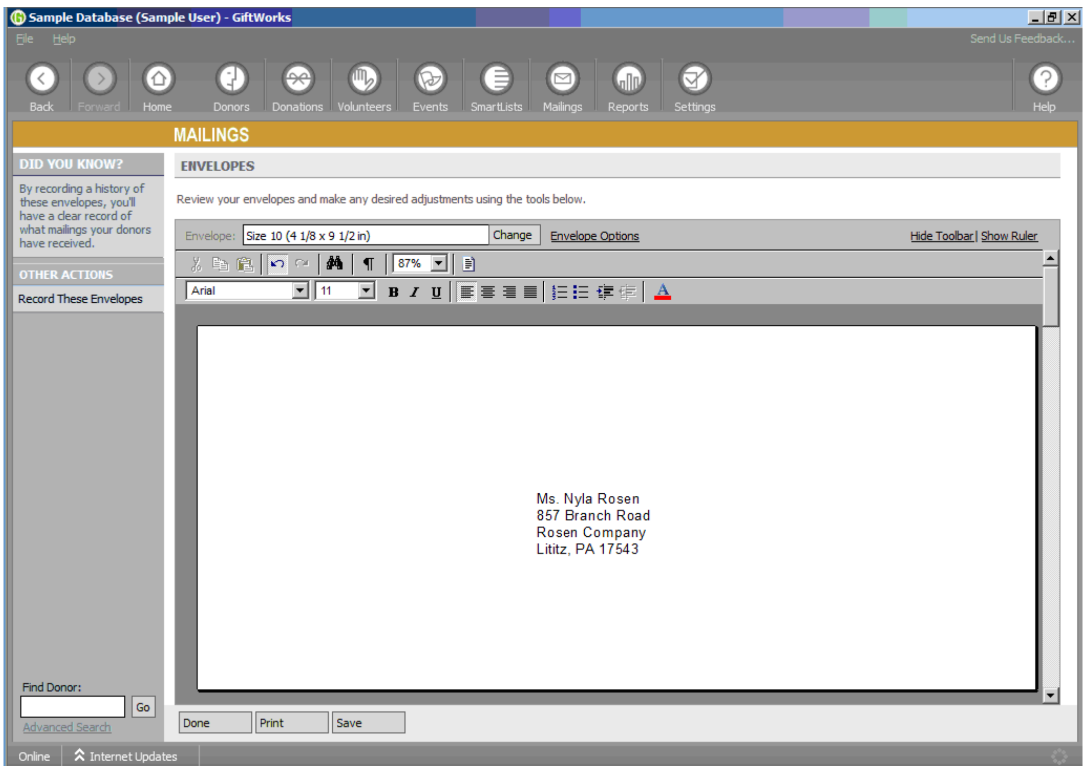
If you click the **Done** button at the bottom of the Mailing Labels screen without recording the labels, GiftWorks will warn you that you have not recorded the labels.

Printing Envelopes

To print envelopes for a donor or list, click the **Print Envelopes** link on the main Mailings page.



You can then choose to create envelopes for just one donor or for a list (SmartList or Mailing list). GiftWorks then creates your envelopes and displays them on the screen.



To choose a different envelope type, click the **Change** button at the top of the Mailing Envelopes screen. GiftWorks includes support for a wide variety of standard envelope sizes. Click **OK** to return to the Mailing Envelopes screen.

To change the formatting for your envelopes, click the **Envelope Options link and then choose Format Envelopes**. On the Envelope Formatting Options screen, choose the database fields you want to insert into your envelopes by clicking the **Insert Field** button. The fields you select will be replaced by information from each recipient's record when your envelopes are created. To delete a field from the envelope, click that field and then click on **Delete Field**. The database fields that have been added to your envelope will appear in gray, surrounded by double angle brackets, like: <<Labels: Addressee - Formal>>.

To modify the font, use the buttons at the top right of the window. **Note: you must first highlight the fields and then choose the font. You can choose a specific font, and you can make text bold, italicized, or underlined. You can also choose a color for the text. The options you choose here will be applied to each envelope as it is generated. If you want to format individual envelopes, modify them in the main Envelopes window using the toolbar.

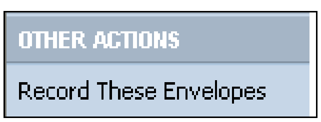
On the bottom half of the Envelope Formatting Options screen, choose whether to print a return address on the envelopes, and enter or modify the return address you want to use. You can modify the font for the return envelope using the buttons at the top right of that section of the screen. At the bottom of the Mailing Envelope Options screen, choose the sorting of the envelopes. Click **OK** when you have finished formatting your envelopes and setting options.

On the main Mailing Envelopes screen, show or hide the toolbar and ruler by clicking the links in the top right corner of the main work area. The toolbar contains buttons for formatting your envelopes, including font style, color and size, alignment, and bullet or outline formats. Change the formatting of any part of your envelope document using the toolbar. The ruler shows you the measurements of where your envelopes fall on the printed page.

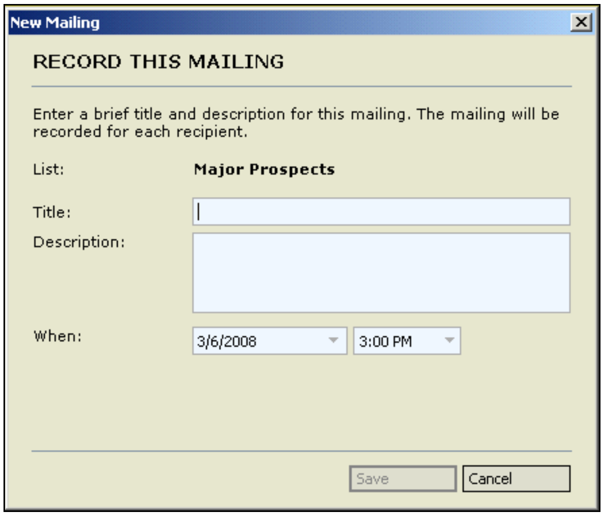
When you are done making changes to your envelopes, click the **Print** or **Save** buttons at the bottom of the main work area. The **Print** button brings up the print options window. The **Save** button lets you choose a filename and location to save the envelopes document in rich text format(.rtf), which you can then open in Microsoft Word.

When you have finished printing or saving your envelopes, click the **Done** button to exit the Mailing Envelopes screen. GiftWorks will warn you if you have not recorded the envelopes.

Recording Envelopes
You can record the printing of envelopes as a mailing in each recipient’s record by clicking **Record These Envelopes** in the **Other Actions** menu.



You might want to record envelopes, for example, if you are printing them out to send a mailing generated outside of GiftWorks. This gives you a record that the mailing was sent out.



If you click the **Done** button at the bottom of the Mailing Envelopes screen without recording the envelopes, GiftWorks will warn you that you have not recorded the envelopes.

SAVING LETTERS, LABELS, OR ENVELOPES

To individualize some of the documents you are sending, or if you just want to save the documents for future reference, click one of the **Save** links on the last step of the mailing process. You will be presented with some options for saving the documents.

Clicking the **Change** button lets you choose a location to save the document files to. You can also choose to save each letter in its own file or all of the letters into one big file.

The **Save** button starts the saving process. Once saving has begun, you can pause it by clicking the **Pause** button. The **Click to control saving** link gives you additional options, including selecting individual items or a number of items to save.

Click the **Done** button when you are finished.

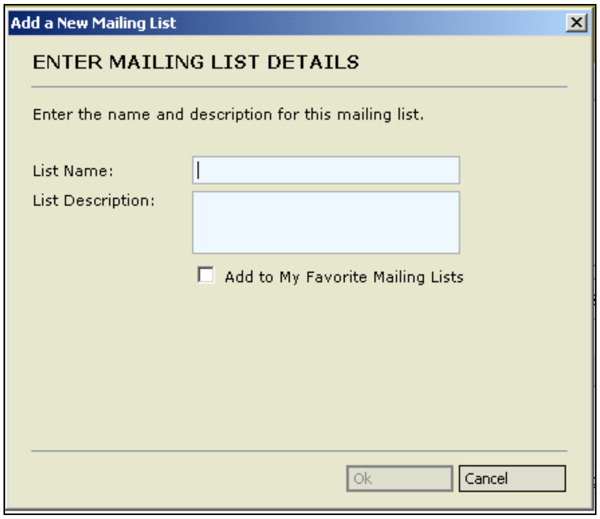
CREATING A MAILING LIST

Mailing Lists let you create a list of donors grouped together for the purpose of sending each donor the same mailing.

There are two default Mailing Lists you can add donors to: **Welcome Letters** and **Newsletter**. You can also create your own Mailing Lists for specific groups (for example, **Annual Report Mailing** or **Golf Classic Promotion List**).

To create a Mailing List, either click **Create a Mailing List** in the **Related Actions** menu, or click **Manage the Mailing Center** in the **Related Actions** menu, then click **Add List** under the **Mailing Lists** section in the main work area.

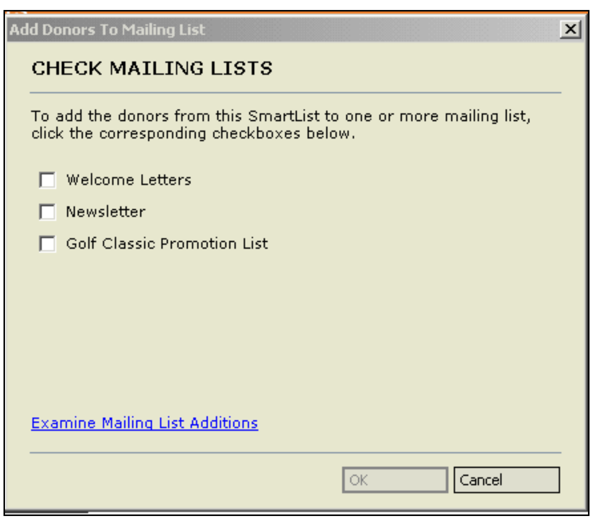
Next, type the name you want to assign to your list and include a description of the list. You can add your new list to your favorites by checking the box shown in the **Mailing List Details** window. Click **OK** to finish creating your list.



Adding and Removing Donors

You can add and remove donors from Mailing Lists in several ways:

From a SmartList, click **Send Mail**, then click **Add these donors to a Mailing List**.



From a Donor record, click **Add to a Mailing List** in the **Mailing Tasks** menu on the left. To remove from the Mailing List, click the gray **X** next to the mailing list under the **Summary** tab.

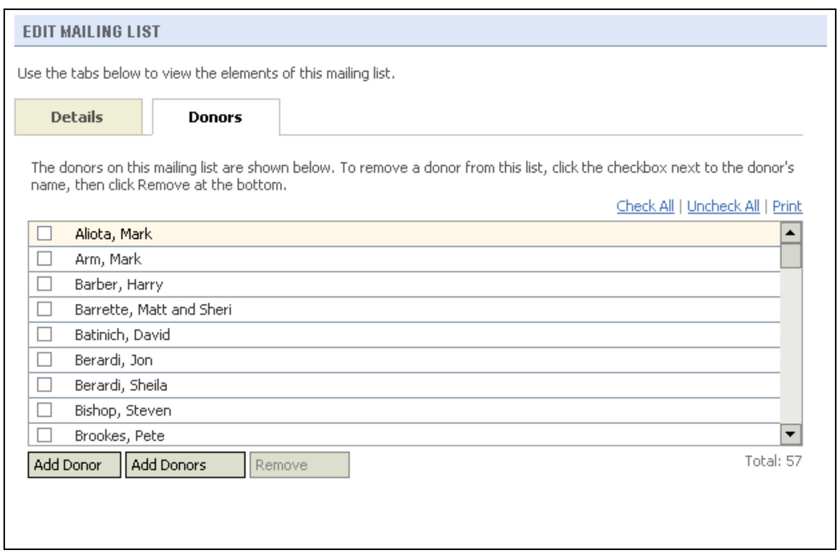
From the Mailings main page, click **Manage the Mailing Center** in the left menu. Then, from the **Mailing Lists** section, highlight the list you want to revise by clicking it. Next, click **Edit List**. Select the **Donors** tab and check or uncheck the donors you want to appear in the Mailing List.

Editing a Mailing List

You can edit a Mailing List in several ways. Start by clicking the Mailing List you want to edit.

From the Details tab: Change the name of your list by clicking **Edit** beside the current list name and typing the new one in the text box. Change the description of your list by clicking **Edit** beside the current list description and typing the new one in the text box. Change the default letter for your list by clicking **Select Letter** beside the letter template currently set for default and choosing a new one from the list.

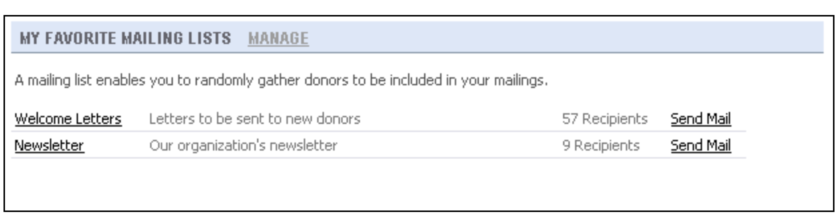
From the Donors tab, click **Add Donor** to select individual donors or **Add Donors** to select an entire existing list of donors to add to your Mailing List. Remove donors from your Mailing List by clicking the checkbox beside their names and then clicking **Remove**.



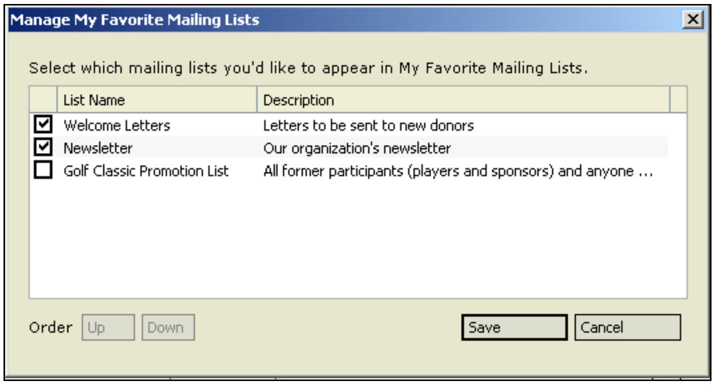
Click **Done** when you've finished editing your Mailing List.

Using My Favorite Mailing Lists

GiftWorks offers quick access to your favorite Mailing Lists in the My Favorite Mailing Lists section of the main Mailings page.

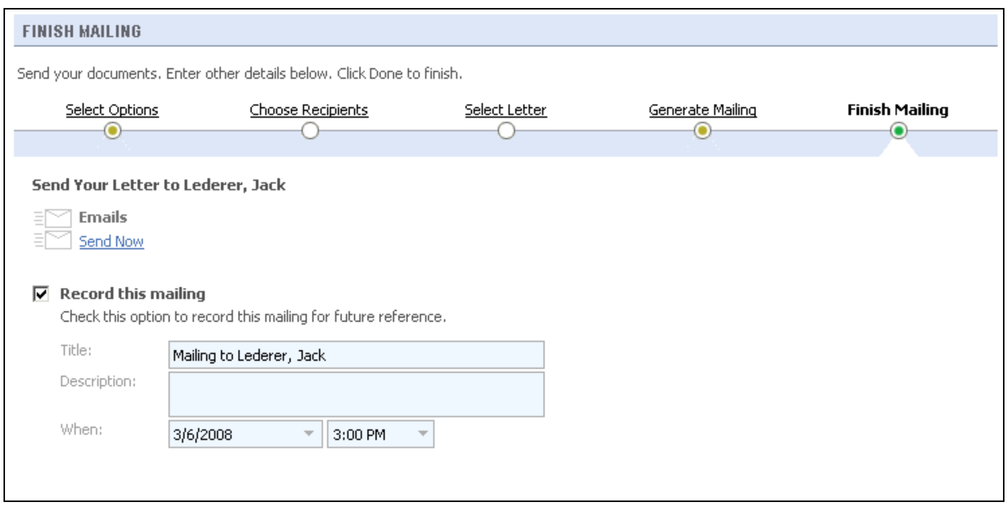


To select the Mailing Lists you want to appear in this section, click **Manage.** Then click the checkbox of the Mailing Lists you want to appear in **My Favorite Mailing Lists**.



RECORDING A MAILING

If you check the **Record this mailing** box during the mailing process, you can enter a title and description for the mailing, as well as a date and time that it was sent. All details will be recorded to the recipient, donation or pledge records, as well as to the GiftWorks Mailing History.



You can view a donor's mailing history on the Notes, Tasks & Files tab of the donor record. You can view the GiftWorks Mailing History by clicking **View Mailing History** in the **Related Actions** menu on the main Mailings page.

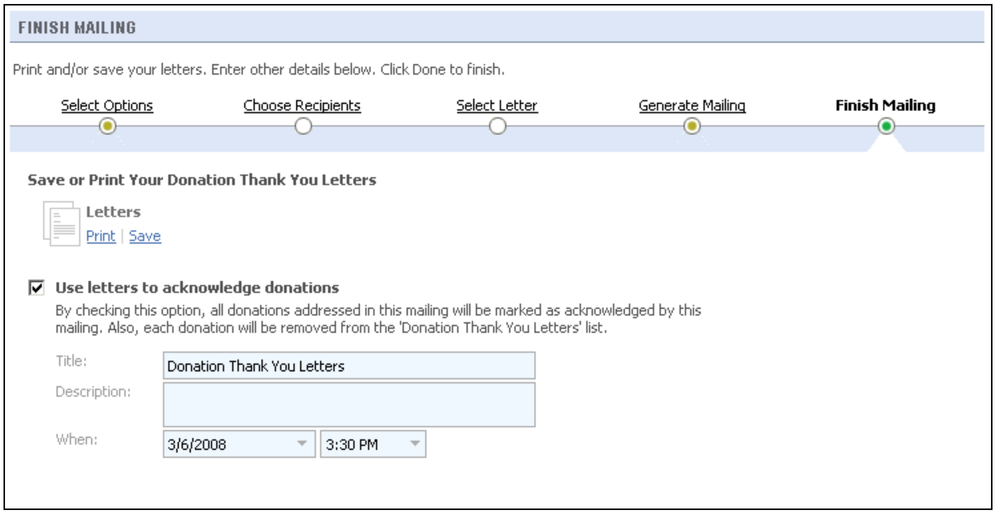
REMOVING RECIPIENTS

If you are sending your mailing to a Mailing List, you can click the **Remove recipients** box to remove the recipients from the Mailing List once you complete the mailing.

For example, if you are sending a welcome mailing to new members of your organization, you may want to remove them from the Welcome Letters list. If you are sending newsletters, you might want to keep them on so that they will receive the next newsletter.

ACKNOWLEDGING DONATIONS AND PLEDGES

If you are sending a Thank You Letters donation mailing, you have the option to mark the donations or pledges as acknowledged by the sending of the mailing. Doing so marks each donation or pledge acknowledged, and includes the details of the mailing.



Checking the box also automatically removes each donation or pledge from the Donation Mailing list.

MANAGING YOUR LETTER LIBRARY

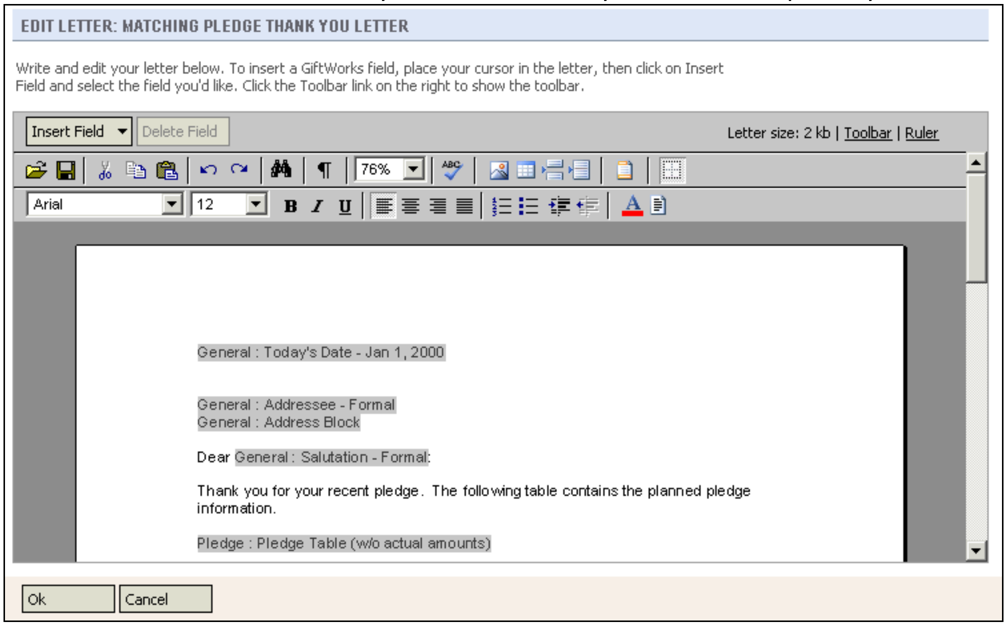
GiftWorks lets you create and store multiple letters in the Letter Library. You can maintain templates for letters you have sent so you can refer to them when creating new letters. You can also store the templates for all of your different acknowledgements and receipts.

To create or modify your letters, click **Manage Letter Library** in the **Related Actions** menu on the main Mailings screen.

The Letter Library is divided into different types of letters: Donors, Donations, Pledges, and Receipts. Each letter type can only be sent to a list of the corresponding type.

USING THE EDIT LETTER SCREEN

The Edit Letter screen is where you write or modify the letter templates you use for your mailings.

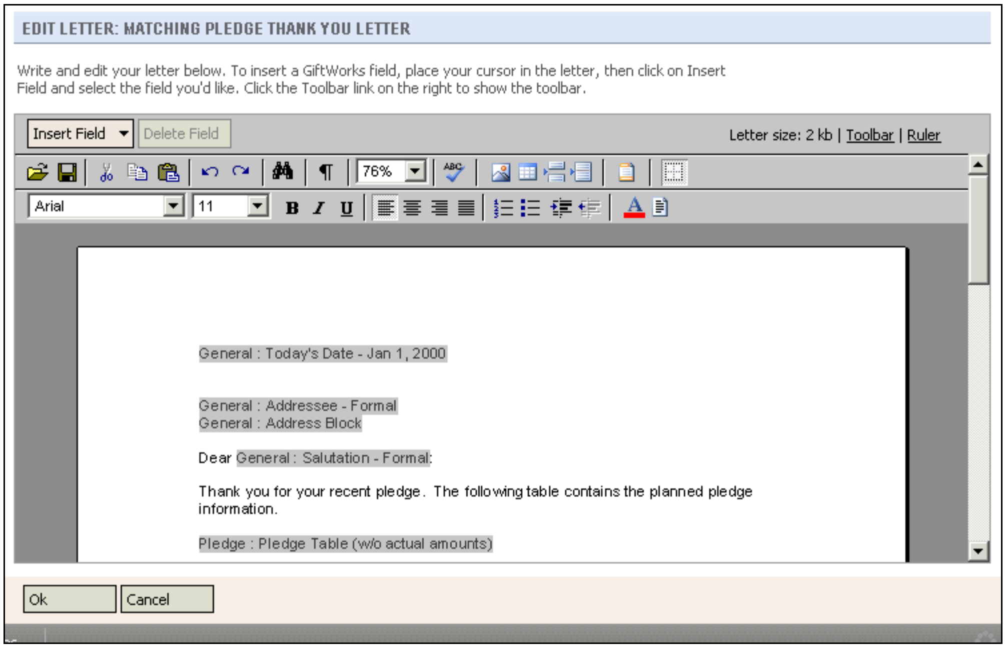


The GiftWorks letter editor includes many standard word-processing features, like the ability to insert pictures, tables, make changes to the font and alignment, and check spelling.

INSERTING FIELDS INTO A LETTER

One of the most important features of GiftWorks is the ability to insert database fields into a letter template.

Using this feature, you can insert the name of a donor, donation, or pledge field into your template and, when the mailing is generated, the corresponding information from each donor, donation, or pledge record will be inserted into the letter. This ability is frequently referred to as “mail merge.”



To insert fields into a letter template, click the **Insert Field** button at the top left of the letter editor screen. Next, click one of the field categories, and then click the field you want to insert. The available fields will vary by the type of letter you are writing. When you are viewing or editing the template, fields inserted into a letter will appear with a gray background and will show the name and field type. This will be replaced with the actual value when you preview or generate your mailing.

On the letter editor screen, you can show or hide the toolbar and ruler by clicking the links in the top right corner of the main work area.

The toolbar contains buttons for formatting the text in your letter, including font style, color and size, alignment, bullet or outline formats, and inserting tables or images. You can change the formatting of any part of your letter document using the toolbar.

The ruler shows you the measurements of where your letter will fall on the printed page. You can check the spelling in your letter by clicking the blue check mark button with ABC on it.

ADDING YOUR OWN LETTER

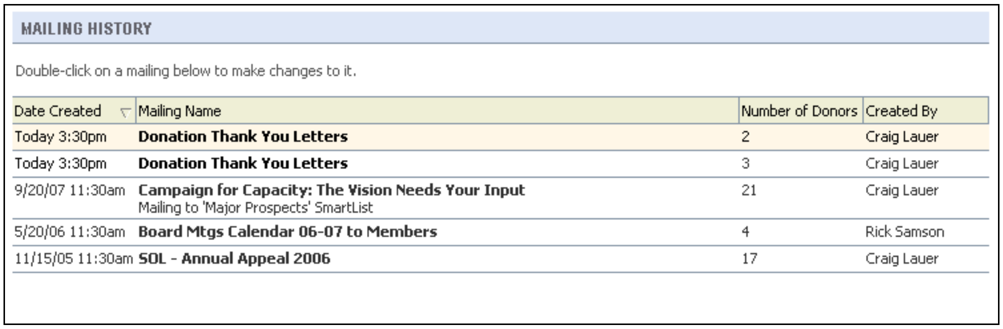
GW is not designed to use the copy/paste function from a Word document.
You will need to open your Word document and clear all formatting. Then choose "save as" and change the file type to Rich Text Format.
Then open GW and go to the Letter Library. Choose to create a new letter and choose a name for it. You will then see a blank page. Click on the yellow folder (located under the Insert Field button).   Find the Rich Text Format file you just saved and click on it and then click on Open.   A message will appear that the file was modified and asks you if you wish to save the modifications – choose no.

The letter will be inserted into GW.   Make any necessary changes/insert fields and tables as needed. Then click on Save at the bottom of the screen.

MAINTAINING YOUR MAILING HISTORY

Each time you send a mailing in GiftWorks, you have the option of recording the mailing to the recipients' records. Doing so allows you to track the communications sent to each donor. You can enter a name for the mailing (like "Board Solicitation March 2007"), a description, and the date and time that the mailing was sent. For each recipient, that mailing will appear on the Notes, Tasks & Files tab.

You can also view and modify the history of all mailings sent through GiftWorks by going to the main Mailings page and clicking **View Mailing History** in the **Related Actions** menu.



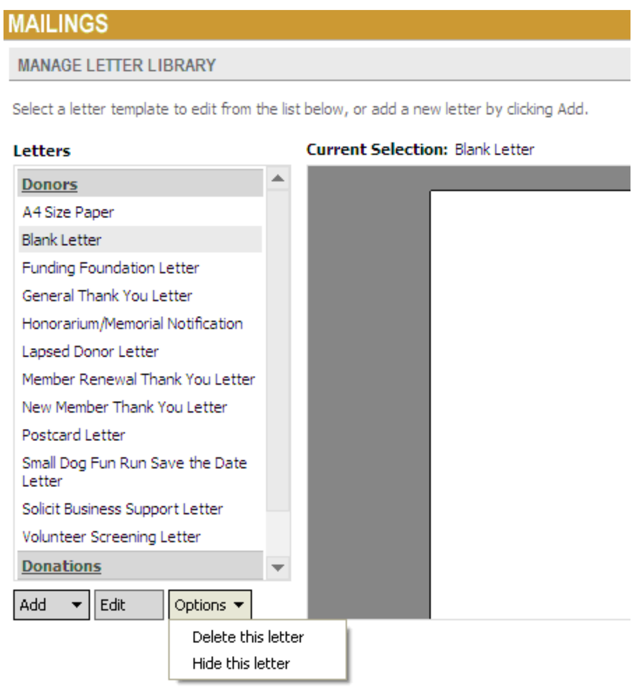
MAILING HISTORY

Double-click on a mailing below to make changes to it.

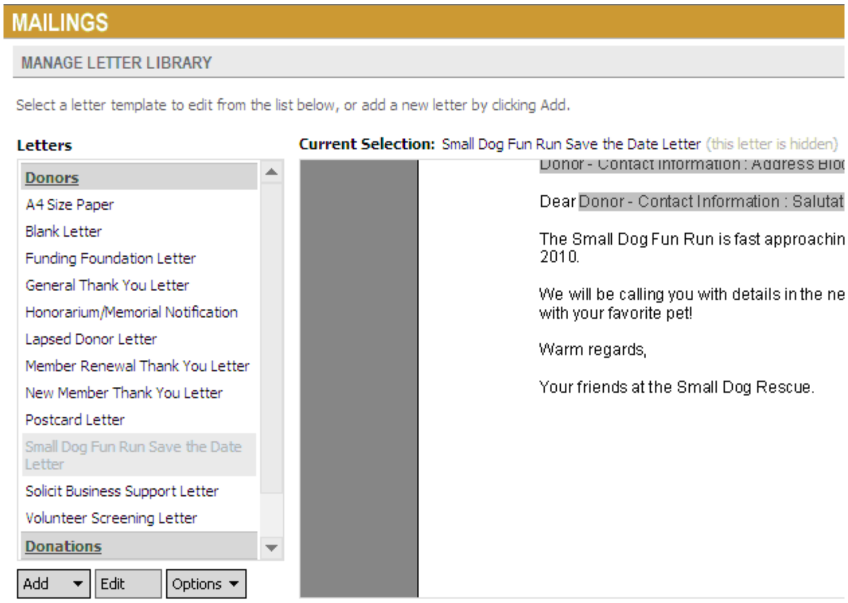
Date Created	Mailing Name	Number of Donors	Created By
Today 3:30pm	**Donation Thank You Letters**	2	Craig Lauer
Today 3:30pm	**Donation Thank You Letters**	3	Craig Lauer
9/20/07 11:30am	**Campaign for Capacity: The Vision Needs Your Input** Mailing to 'Major Prospects' SmartList	21	Craig Lauer
5/20/06 11:30am	**Board Mtgs Calendar 06-07 to Members**	4	Rick Samson
11/15/05 11:30am	**SOL - Annual Appeal 2006**	17	Craig Lauer

The Mailing History screen shows you each mailing sent, how many donors received the mailing, and which GiftWorks user created the mailing. By double-clicking on any mailing, you can edit the details of that mailing. Note that any changes you make here will be applied to each recipient record.

You can also 'Hide' Letters that you are not currently using. Click on the letter then click on Options



Choose "Hide the Letter"
You will now see (this letter is hidden) when viewing the letter.
The letter name will also show in pale grey when viewing letters in Library


MAILINGS
MANAGE LETTER LIBRARY
Select a letter template to edit from the list below, or add a new letter by clicking Add.
Letters
Current Selection: Small Dog Fun Run Save the Date Letter (this letter is hidden)
Donors
A4 Size Paper
Blank Letter
Funding Foundation Letter
General Thank You Letter
Honorarium/Memorial Notification
Lapsed Donor Letter
Member Renewal Thank You Letter
New Member Thank You Letter
Postcard Letter
Small Dog Fun Run Save the Date Letter
Solicit Business Support Letter
Volunteer Screening Letter
Donations
Add
Edit
Options
Dear
The Small Dog Fun Run is fast approachin
2010.
We will be calling you with details in the ne
with your favorite pet!
Warm regards,
Your friends at the Small Dog Rescue.

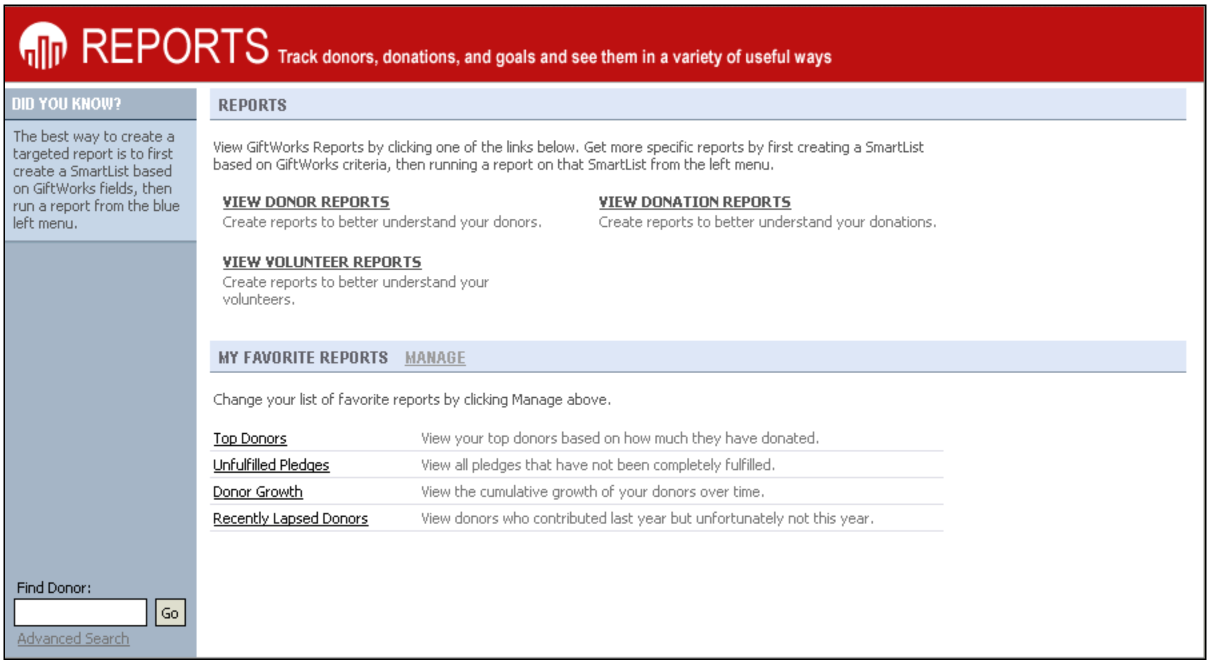
REPORTS

IN THIS SECTION

Printing, Exporting and Emailing Reports
Save Report Design

REPORTS OVERVIEW

After entering your donors and donations, GiftWorks Reports let you review, analyze, and share your information. You can report on giving trends for your board of directors, review your top donors with your annual campaign chair, analyze opportunities with your executive committee, and much more. Reports let you create the reports you need in formats that are both concise and informative.

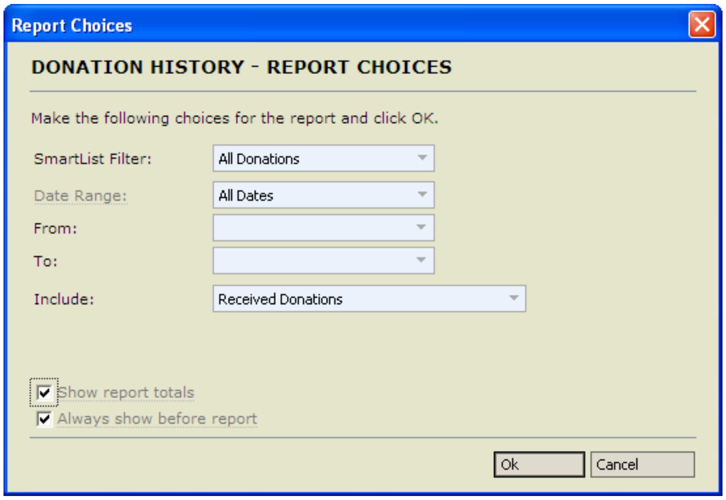


GiftWorks provides two groups of reports that enable your organization to monitor productivity and achievements at a glance: donor reports, and donation reports.

The reports you find most useful can be accessed quickly in My Favorite Reports at the bottom of the main work area of your Reports screen.

When you need a report to show data for a specific group of donors or donations, you can run a report on a SmartList. GiftWorks reports offer a variety of report styles so you can present your data in the most meaningful way for your organization. Reports can be viewed as lists, summaries, bar, line, and pie charts.

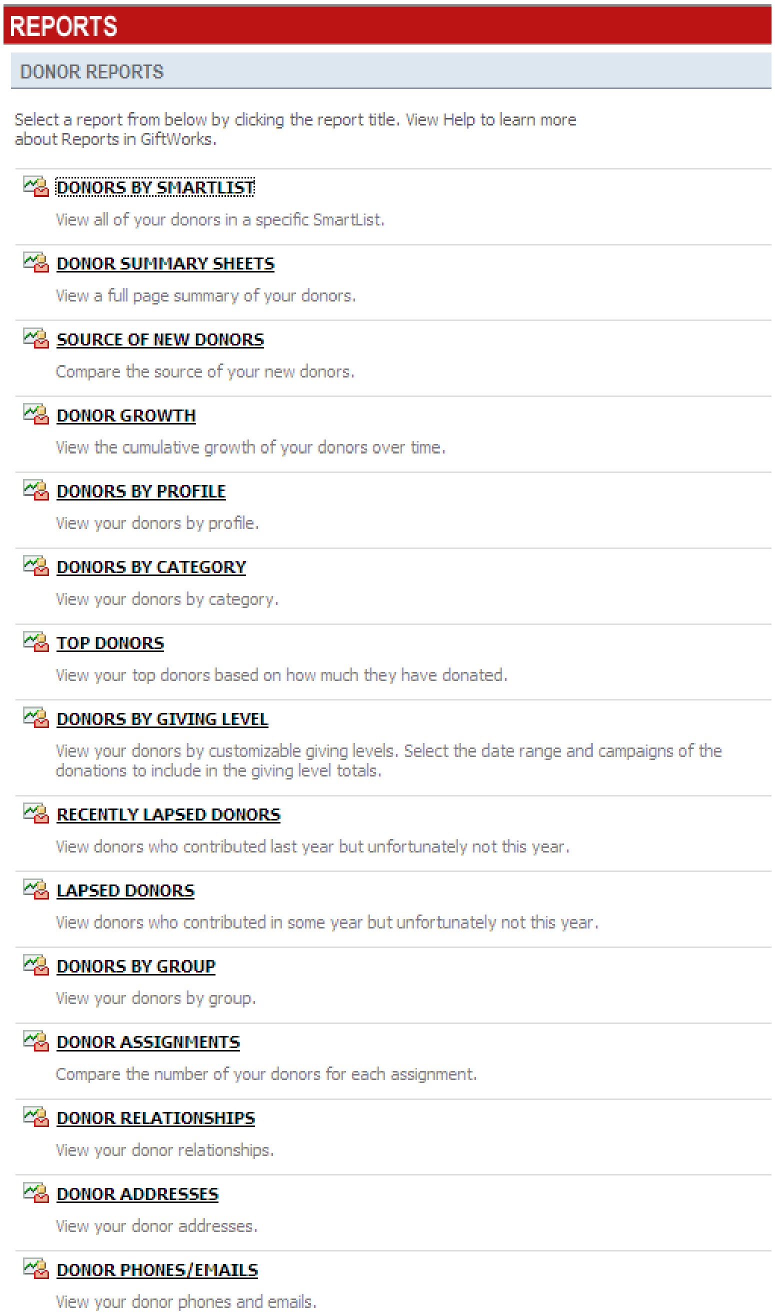
When you click on a report, the Report Choices screen opens.



This allows you to set up the parameters of your report before generating it. The choices available on this screen vary depending on the report you have chosen. If you want, you can tell GiftWorks not to show you this screen by unchecking the box **Always show before report**. You can see the screen again by clicking **Customize Report** on the left under **Related Actions**.

VIEWING DONOR REPORTS

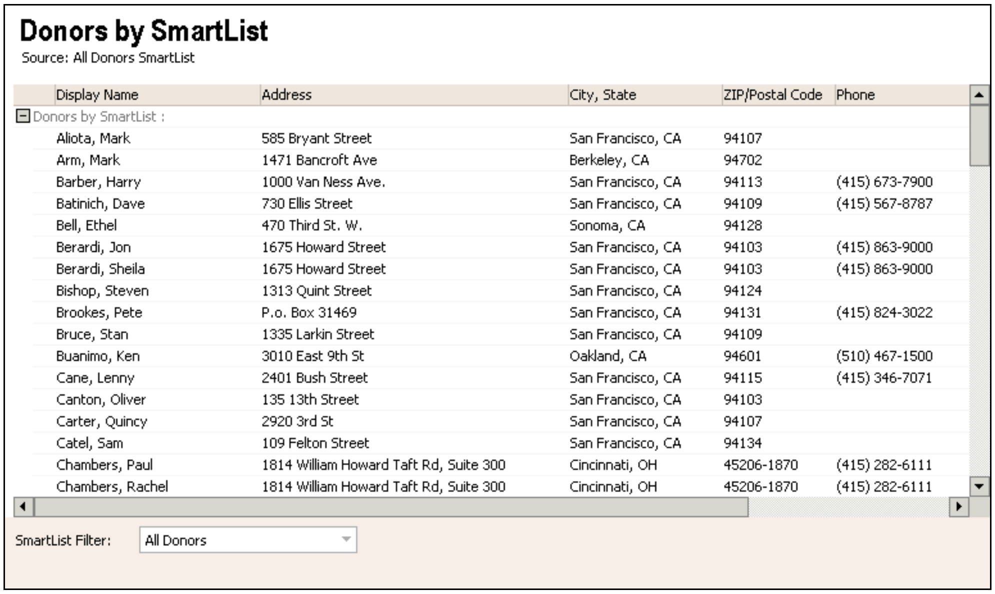
GiftWorks offers 15 donor reports that consolidate donor information into views that let you analyze and evaluate your organization. On all donor reports, you can view donor information. Some reports contain donation information as well.



Click **View Donor Reports** in the work area of your main Reports screen to view a list of available donor reports. To view any of the reports, click the name of the report.

See the items below to learn more about each report.

Donors by SmartList
This report provides a view of the donors contained in any one of your donor SmartLists. Choose the SmartList for your report using the SmartList selection box on the Report Choices screen, the SmartList Filter dropdown list at the bottom of the screen within the report, or from the Customize Report option in the Related Actions menu.



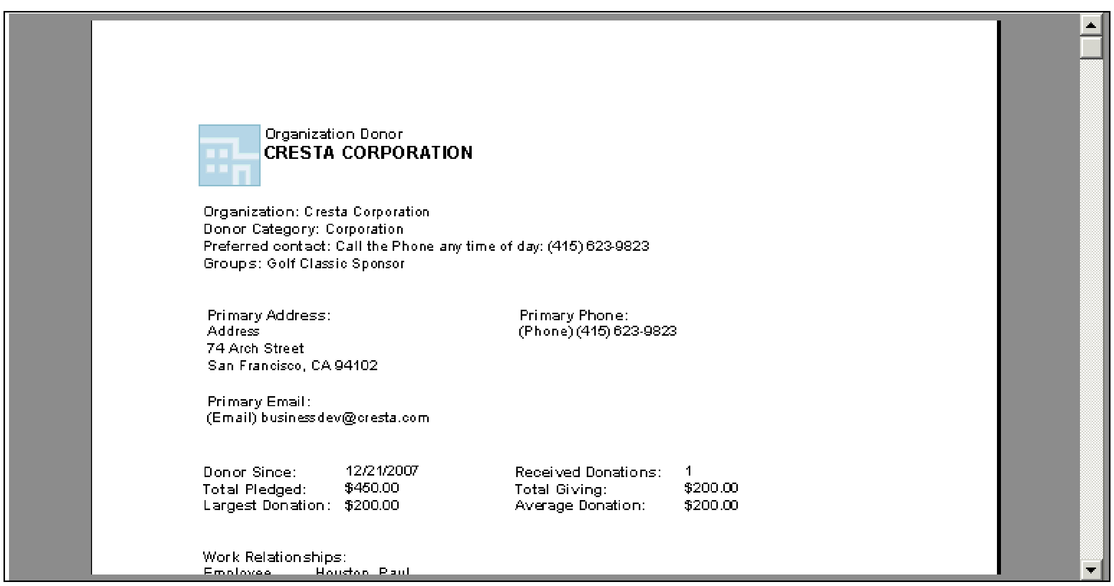
Donors by SmartList
Source: All Donors SmartList

Display Name	Address	City, State	ZIP/Postal Code	Phone
Donors by SmartList :				
Aliota, Mark	585 Bryant Street	San Francisco, CA	94107	
Arm, Mark	1471 Bancroft Ave	Berkeley, CA	94702	
Barber, Harry	1000 Van Ness Ave.	San Francisco, CA	94113	(415) 673-7900
Batinich, Dave	730 Ellis Street	San Francisco, CA	94109	(415) 567-8787
Bell, Ethel	470 Third St. W.	Sonoma, CA	94128	
Berardi, Jon	1675 Howard Street	San Francisco, CA	94103	(415) 863-9000
Berardi, Sheila	1675 Howard Street	San Francisco, CA	94103	(415) 863-9000
Bishop, Steven	1313 Quint Street	San Francisco, CA	94124	
Brookes, Pete	P.o. Box 31469	San Francisco, CA	94131	(415) 824-3022
Bruce, Stan	1335 Larkin Street	San Francisco, CA	94109	
Buanimo, Ken	3010 East 9th St	Oakland, CA	94601	(510) 467-1500
Cane, Lenny	2401 Bush Street	San Francisco, CA	94115	(415) 346-7071
Canton, Oliver	135 13th Street	San Francisco, CA	94103	
Carter, Quincy	2920 3rd St	San Francisco, CA	94107	
Catel, Sam	109 Felton Street	San Francisco, CA	94134	
Chambers, Paul	1814 William Howard Taft Rd, Suite 300	Cincinnati, OH	45206-1870	(415) 282-6111
Chambers, Rachel	1814 William Howard Taft Rd, Suite 300	Cincinnati, OH	45206-1870	(415) 282-6111

SmartList Filter: All Donors

This report also has a Phone List option under Change Report Style that lets you create a phone list for the donors contained in your chosen SmartList.

Donor Summary Sheets
This report provides the opportunity to print out a donor summary sheet for each of the donors in the SmartList that you select. If you are generating summary sheets for a large list of donors, you will see a window that indicates the progress of the report generation. It may take a long time to generate a large number of summary sheets.



Organization Donor
CRESTA CORPORATION

Organization: Cresta Corporation
Donor Category: Corporation
Preferred contact: Call the Phone any time of day: (415) 623-9823
Groups: Golf Classic Sponsor

Primary Address:
Address
74 Arch Street
San Francisco, CA 94102

Primary Phone:
(Phone) (415) 623-9823

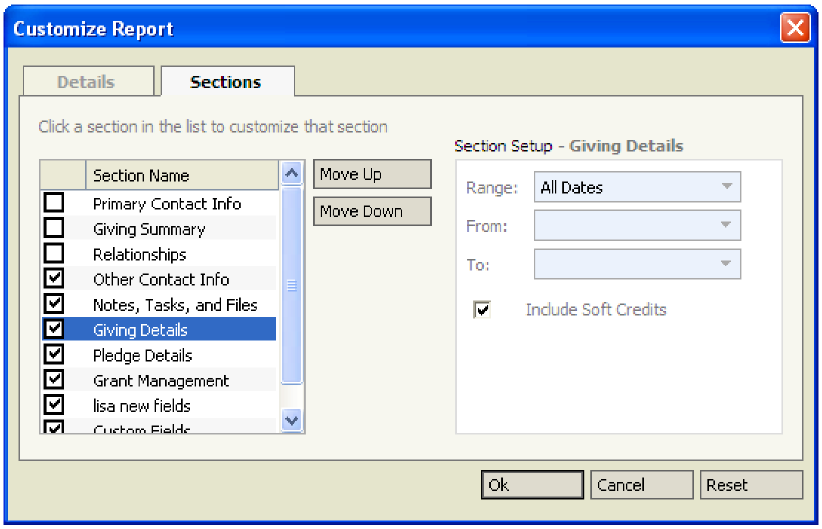
Primary Email:
(Email) businessdev@cresta.com

Donor Since:	12/21/2007	Received Donations:	1
Total Pledged:	$450.00	Total Giving:	$200.00
Largest Donation:	$200.00	Average Donation:	$200.00

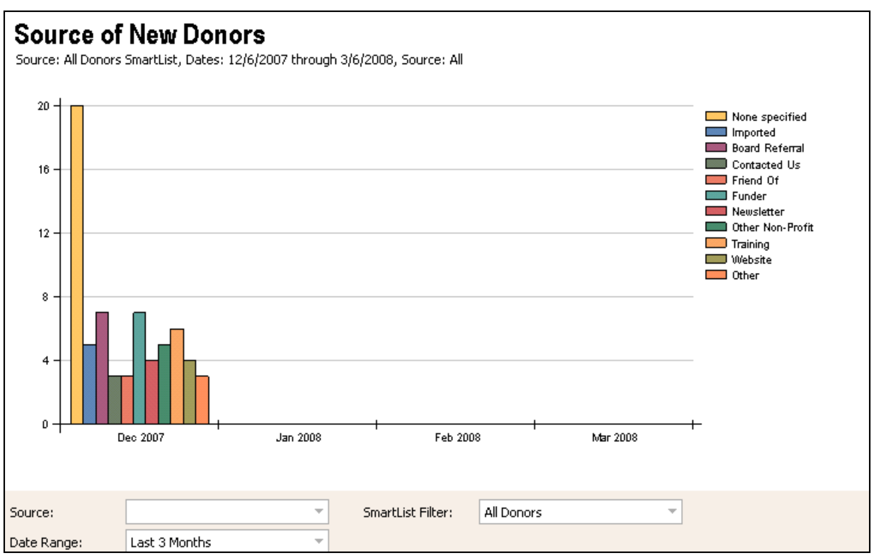
Work Relationships:

Choose the SmartList for your report using the SmartList selection box on the Report Choices screen, the SmartList Filter dropdown list at the bottom of the screen within the report, or from the Customize Report option in the left Related Actions menu.

Click on Customize then click on Sections to choose which sections to display on the Report.
You can also choose different Giving Details and choose to include Soft Credits.



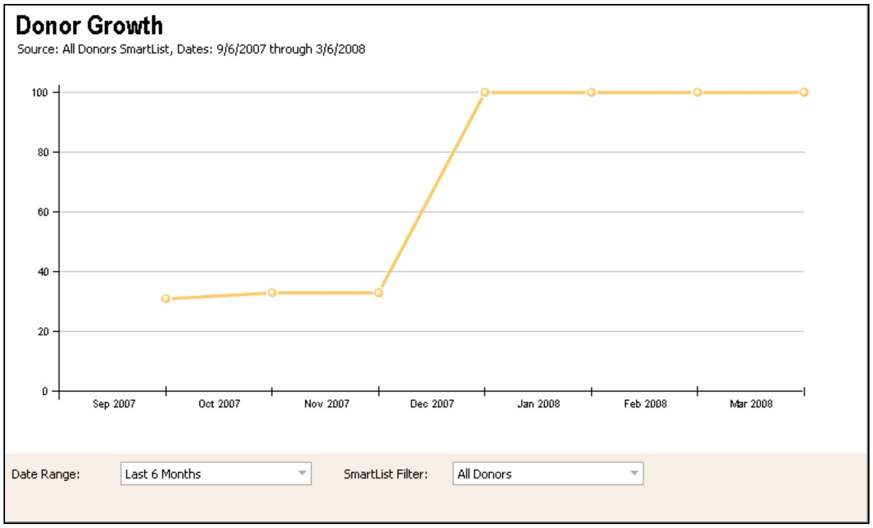
Source of New Donors
This report allows you to compare the effectiveness of your donor sources. While this report can include all donor records, you can limit the donors included by indicating a specific date range, source, and/or SmartList.



Choose the options for your report using the Report Choices screen or at the bottom of the screen within the report.

Donor Growth

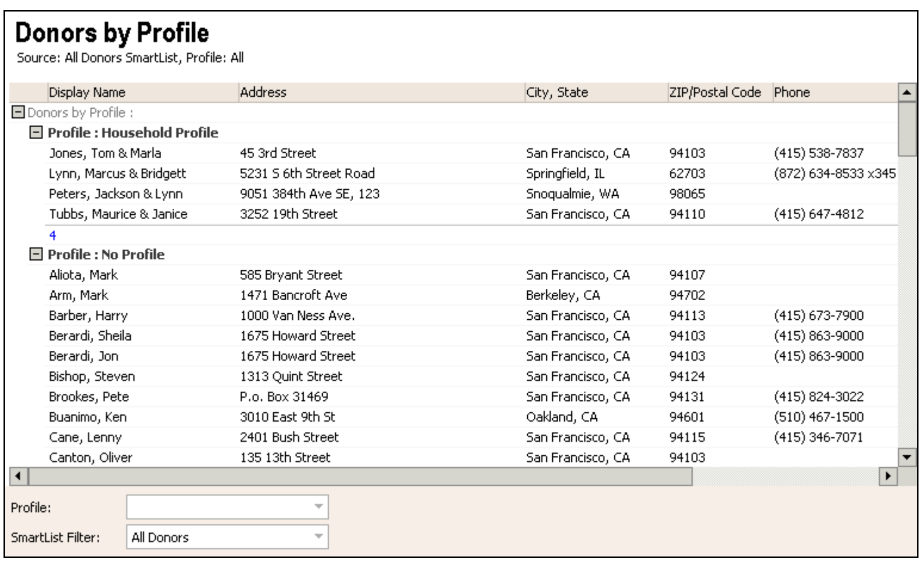
This report lets you see how the number of donors in your GiftWorks database has grown over time. It shows a snapshot of the number of donors in GiftWorks at a given point in time. You can further narrow your results using the date range selection field. You can also choose a SmartList for this report using the Report Choices screen, Customize options, or at the bottom of the screen within the report.



This report is particularly powerful when viewed as a line or bar graph.

Donors by Profile

This report allows you a breakdown of donors in your database by Profile (Household, Organization, and/or No Profile).



Donors by Profile

Source: All Donors SmartList, Profile: All

Display Name	Address	City, State	ZIP/Postal Code	Phone
Donors by Profile :				
Profile : Household Profile				
Jones, Tom & Marla	45 3rd Street	San Francisco, CA	94103	(415) 538-7837
Lynn, Marcus & Bridgett	5231 S 6th Street Road	Springfield, IL	62703	(872) 634-8533 x345
Peters, Jackson & Lynn	9051 384th Ave SE, 123	Snoqualmie, WA	98065	
Tubbs, Maurice & Janice	3252 19th Street	San Francisco, CA	94110	(415) 647-4812
4				
Profile : No Profile				
Aliota, Mark	585 Bryant Street	San Francisco, CA	94107	
Arm, Mark	1471 Bancroft Ave	Berkeley, CA	94702	
Barber, Harry	1000 Van Ness Ave.	San Francisco, CA	94113	(415) 673-7900
Berardi, Sheila	1675 Howard Street	San Francisco, CA	94103	(415) 863-9000
Berardi, Jon	1675 Howard Street	San Francisco, CA	94103	(415) 863-9000
Bishop, Steven	1313 Quint Street	San Francisco, CA	94124	
Brookes, Pete	P.o. Box 31469	San Francisco, CA	94131	(415) 824-3022
Buanimo, Ken	3010 East 9th St	Oakland, CA	94601	(510) 467-1500
Cane, Lenny	2401 Bush Street	San Francisco, CA	94115	(415) 346-7071
Canton, Oliver	135 13th Street	San Francisco, CA	94103	

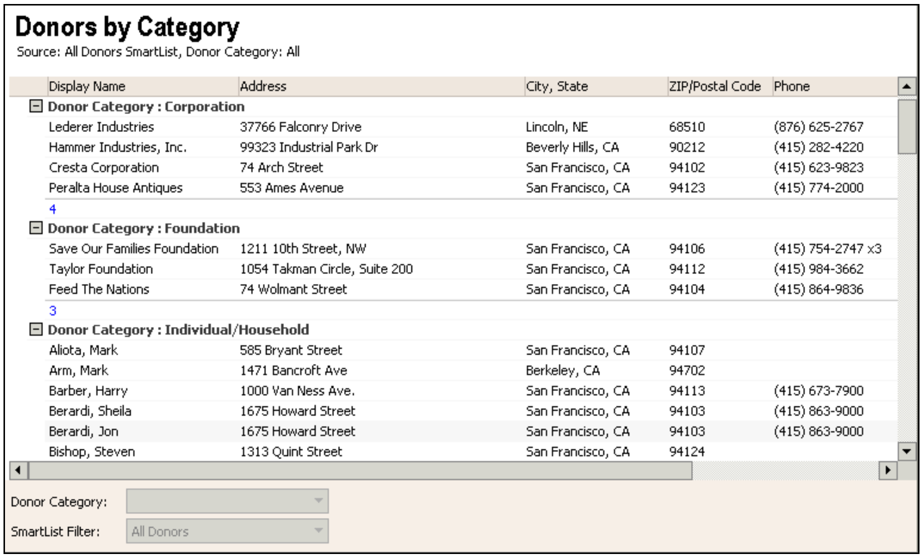
Profile:

SmartList Filter: All Donors

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Donors by Category

This report shows you a breakdown of donors in your database by donor category.



Donors by Category

Source: All Donors SmartList, Donor Category: All

Display Name	Address	City, State	ZIP/Postal Code	Phone
Donor Category : Corporation				
Lederer Industries	37766 Falconry Drive	Lincoln, NE	68510	(876) 625-2767
Hammer Industries, Inc.	99323 Industrial Park Dr	Beverly Hills, CA	90212	(415) 282-4220
Cresta Corporation	74 Arch Street	San Francisco, CA	94102	(415) 623-9823
Peralta House Antiques	553 Ames Avenue	San Francisco, CA	94123	(415) 774-2000
4				
Donor Category : Foundation				
Save Our Families Foundation	1211 10th Street, NW	San Francisco, CA	94106	(415) 754-2747 x3
Taylor Foundation	1054 Takman Circle, Suite 200	San Francisco, CA	94112	(415) 984-3662
Feed The Nations	74 Wolmant Street	San Francisco, CA	94104	(415) 864-9836
3				
Donor Category : Individual/Household				
Aliota, Mark	585 Bryant Street	San Francisco, CA	94107	
Arm, Mark	1471 Bancroft Ave	Berkeley, CA	94702	
Barber, Harry	1000 Van Ness Ave.	San Francisco, CA	94113	(415) 673-7900
Berardi, Sheila	1675 Howard Street	San Francisco, CA	94103	(415) 863-9000
Berardi, Jon	1675 Howard Street	San Francisco, CA	94103	(415) 863-9000
Bishop, Steven	1313 Quint Street	San Francisco, CA	94124	

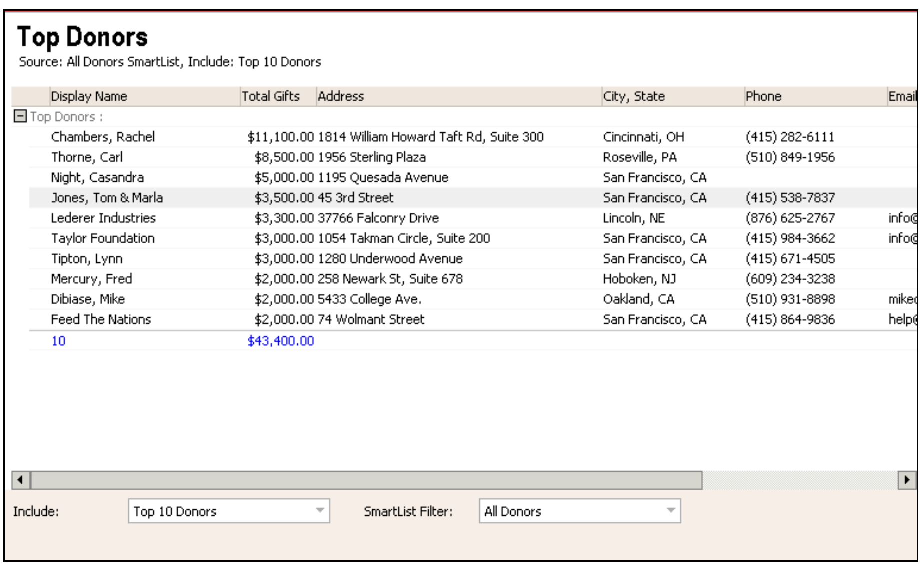
Donor Category:

SmartList Filter: All Donors

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Top Donors

This report shows a list of the top donors based on how much they have donated in total to your organization. Donation information is included per donor record. You can choose from top 10, 25, 50, 100, 500, or all donors by SmartList. Note that if you have a number of top donors selected, the report will include no fewer than the selected number, but will include more if some donors have given the same amount.



Top Donors

Source: All Donors SmartList, Include: Top 10 Donors

Display Name	Total Gifts	Address	City, State	Phone	Email
Top Donors :					
Chambers, Rachel	$11,100.00	1814 William Howard Taft Rd, Suite 300	Cincinnati, OH	(415) 282-6111	
Thorne, Carl	$8,500.00	1956 Sterling Plaza	Roseville, PA	(510) 849-1956	
Night, Casandra	$5,000.00	1195 Quesada Avenue	San Francisco, CA		
Jones, Tom & Marla	$3,500.00	45 3rd Street	San Francisco, CA	(415) 538-7837	
Lederer Industries	$3,300.00	37766 Falconry Drive	Lincoln, NE	(876) 625-2767	info@
Taylor Foundation	$3,000.00	1054 Takman Circle, Suite 200	San Francisco, CA	(415) 984-3662	info@
Tipton, Lynn	$3,000.00	1280 Underwood Avenue	San Francisco, CA	(415) 671-4505	
Mercury, Fred	$2,000.00	258 Newark St, Suite 678	Hoboken, NJ	(609) 234-3238	
Dibiase, Mike	$2,000.00	5433 College Ave.	Oakland, CA	(510) 931-8898	mike@
Feed The Nations	$2,000.00	74 Wolmant Street	San Francisco, CA	(415) 864-9836	help@
10	$43,400.00				

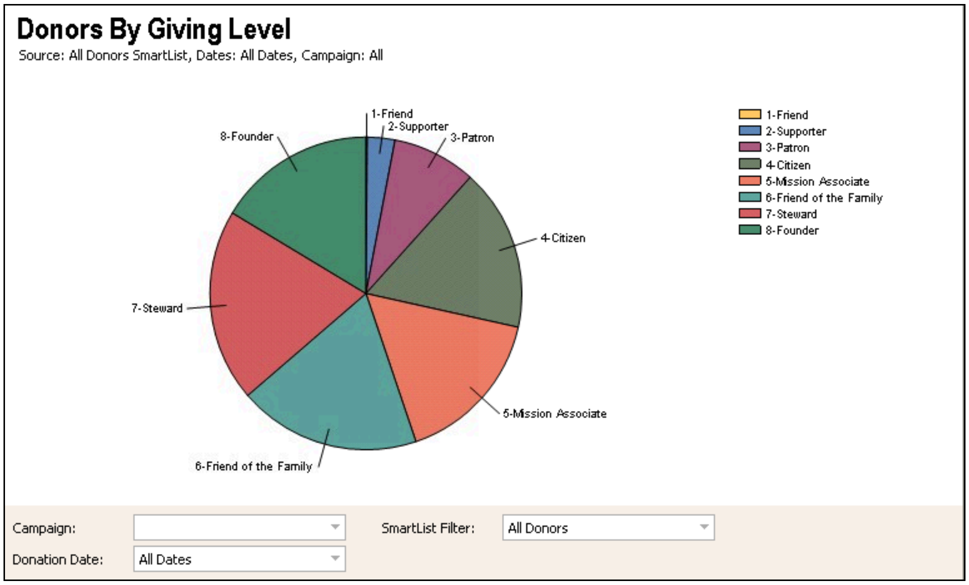
Include: Top 10 Donors

SmartList Filter: All Donors

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Donors by Giving Level

This report allows you to view your donors by customized giving levels. You can select a SmartList and can further narrow the results by selecting a date range and/or specific campaign.

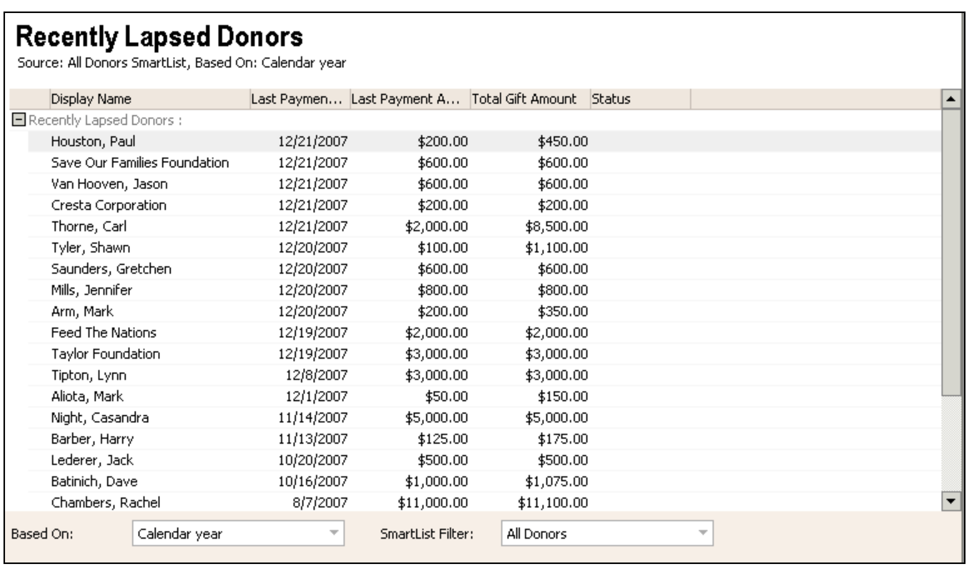


The customized giving levels for this report can be modified by clicking **Customize Report** in the **Related Actions** menu. You can define up to eight giving levels. You can give each level a label (for example, friend or patron) and then define the donation range for that level. This report can be very useful if you need to generate a list of your donors by your organization's defined giving levels for a program, newsletter, or other recognition.

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Recently Lapsed Donors

Also known as a LYBUNT (Last Year But Unfortunately Not This year) report, this report shows a list of donors who contributed to your organization last calendar year or last fiscal year, but who have not contributed in the current calendar year or fiscal year. Donation information is included per donor record. The donors in this report might make a good target for a solicitation to encourage them to renew their commitment to your organization.



Recently Lapsed Donors

Source: All Donors SmartList, Based On: Calendar year

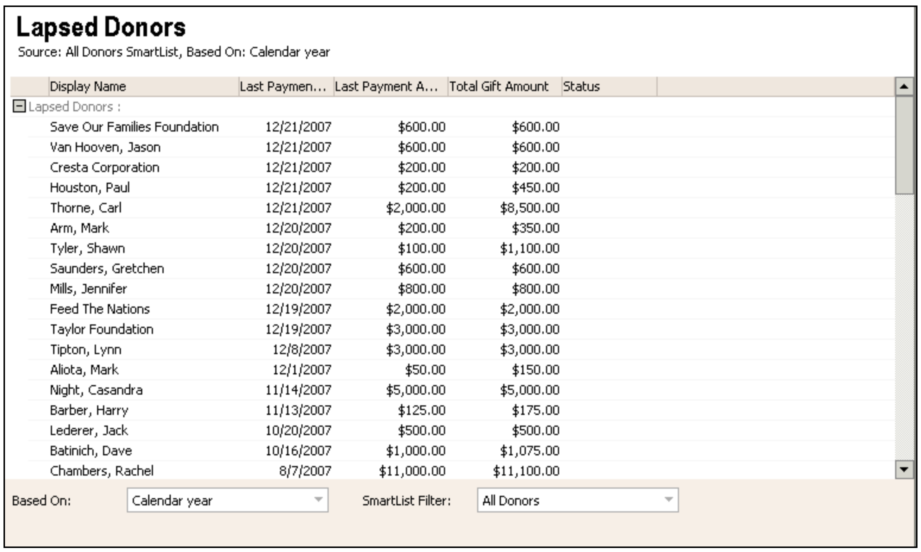
Display Name	Last Paymen...	Last Payment A...	Total Gift Amount	Status
Recently Lapsed Donors :				
Houston, Paul	12/21/2007	$200.00	$450.00	
Save Our Families Foundation	12/21/2007	$600.00	$600.00	
Van Hooven, Jason	12/21/2007	$600.00	$600.00	
Cresta Corporation	12/21/2007	$200.00	$200.00	
Thorne, Carl	12/21/2007	$2,000.00	$8,500.00	
Tyler, Shawn	12/20/2007	$100.00	$1,100.00	
Saunders, Gretchen	12/20/2007	$600.00	$600.00	
Mills, Jennifer	12/20/2007	$800.00	$800.00	
Arm, Mark	12/20/2007	$200.00	$350.00	
Feed The Nations	12/19/2007	$2,000.00	$2,000.00	
Taylor Foundation	12/19/2007	$3,000.00	$3,000.00	
Tipton, Lynn	12/8/2007	$3,000.00	$3,000.00	
Aliota, Mark	12/1/2007	$50.00	$150.00	
Night, Casandra	11/14/2007	$5,000.00	$5,000.00	
Barber, Harry	11/13/2007	$125.00	$175.00	
Lederer, Jack	10/20/2007	$500.00	$500.00	
Batinich, Dave	10/16/2007	$1,000.00	$1,075.00	
Chambers, Rachel	8/7/2007	$11,000.00	$11,100.00	

Based On: Calendar year SmartList Filter: All Donors

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Lapsed Donors

Also known as a SYBUNT (or Some Year But Unfortunately Not This year) report, this report provides a list of all donors who contributed to your organization in the past but have not contributed in the current calendar or fiscal year. Donation information is included per donor record. The donors in this report might make a good target for a solicitation to encourage them to renew their commitment to your organization.



Lapsed Donors

Source: All Donors SmartList, Based On: Calendar year

Display Name	Last Paymen...	Last Payment A...	Total Gift Amount	Status
Lapsed Donors :				
Save Our Families Foundation	12/21/2007	$600.00	$600.00	
Van Hooven, Jason	12/21/2007	$600.00	$600.00	
Cresta Corporation	12/21/2007	$200.00	$200.00	
Houston, Paul	12/21/2007	$200.00	$450.00	
Thorne, Carl	12/21/2007	$2,000.00	$8,500.00	
Arm, Mark	12/20/2007	$200.00	$350.00	
Tyler, Shawn	12/20/2007	$100.00	$1,100.00	
Saunders, Gretchen	12/20/2007	$600.00	$600.00	
Mills, Jennifer	12/20/2007	$800.00	$800.00	
Feed The Nations	12/19/2007	$2,000.00	$2,000.00	
Taylor Foundation	12/19/2007	$3,000.00	$3,000.00	
Tipton, Lynn	12/8/2007	$3,000.00	$3,000.00	
Aliota, Mark	12/1/2007	$50.00	$150.00	
Night, Casandra	11/14/2007	$5,000.00	$5,000.00	
Barber, Harry	11/13/2007	$125.00	$175.00	
Lederer, Jack	10/20/2007	$500.00	$500.00	
Batinich, Dave	10/16/2007	$1,000.00	$1,075.00	
Chambers, Rachel	8/7/2007	$11,000.00	$11,100.00	

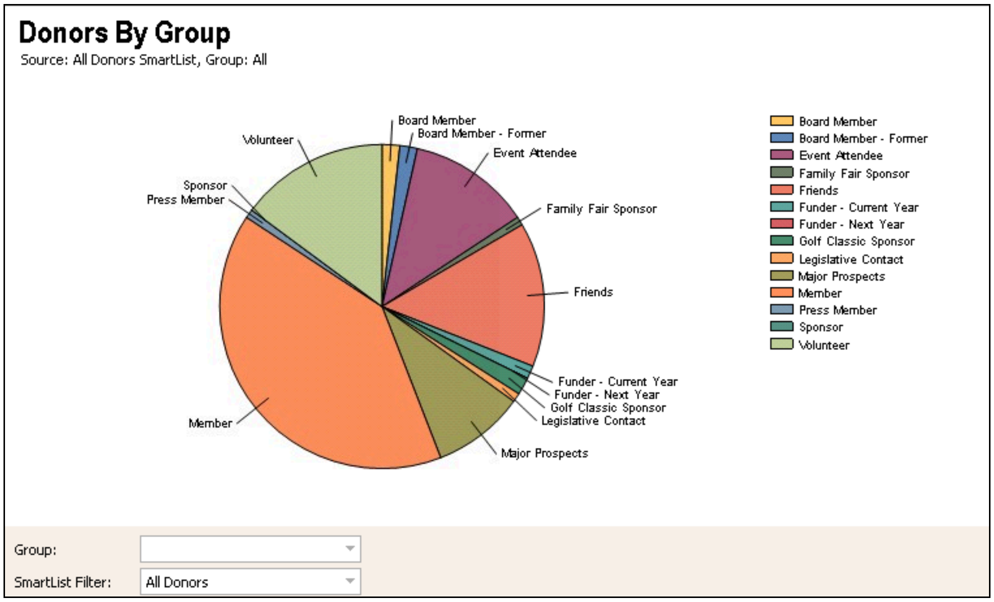
Based On: Calendar year SmartList Filter: All Donors

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Donors By Group

This report provides a breakdown of donors who are in a certain group or groups.

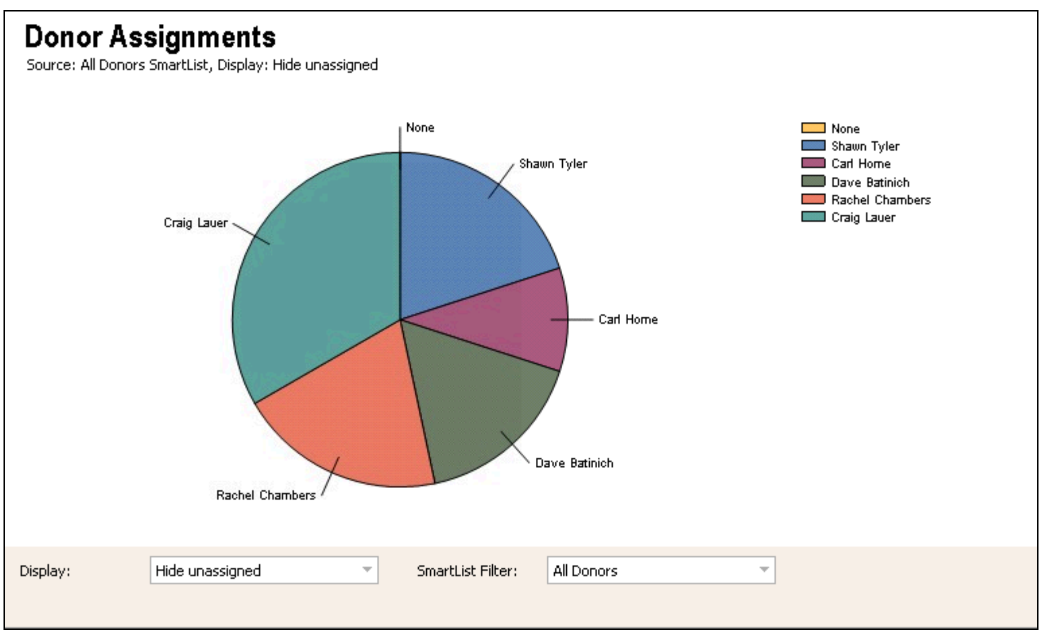
A donor might be included on the report multiple times since donors can be in more than one group.



Choose the options for your report using the Report Choices screen, under Customize Report or at the bottom of the screen within the report.

Donor Assignments

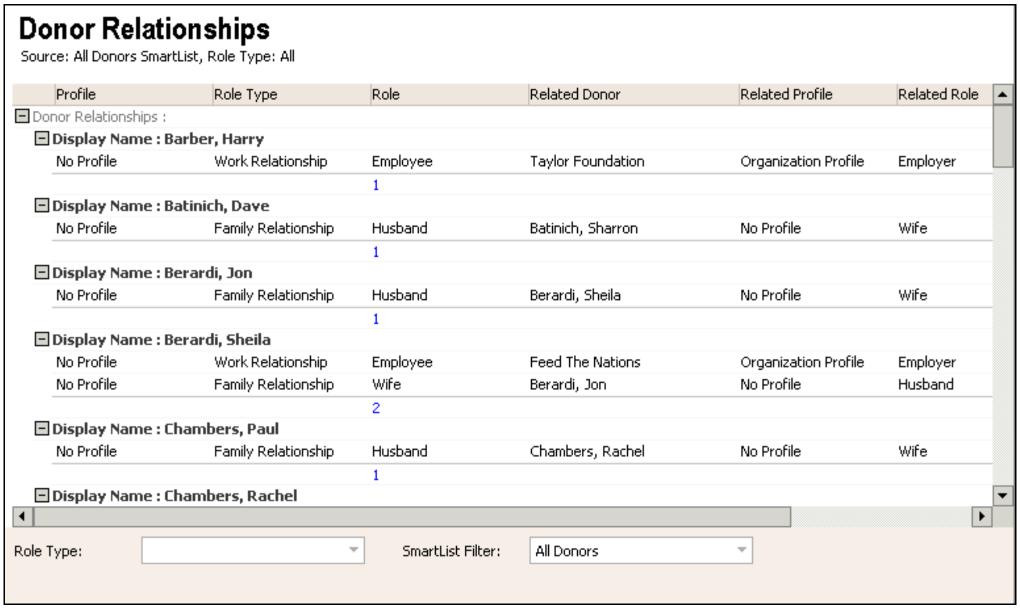
This report provides a breakdown of donors by whom they are assigned to within the database. You can choose to show or hide unassigned donors.



Choose the options for your report using the Report Choices, under Customize Report, screen or at the bottom of the screen within the report.

Donor Relationships

This report provides a list of donors who have relationships, the donors to whom each is related, and the type of relationship. Donors who have relationships may show up on the report multiple times, showing everyone that is related to them and showing all of the donors they are related to.



Donor Relationships

Source: All Donors SmartList, Role Type: All

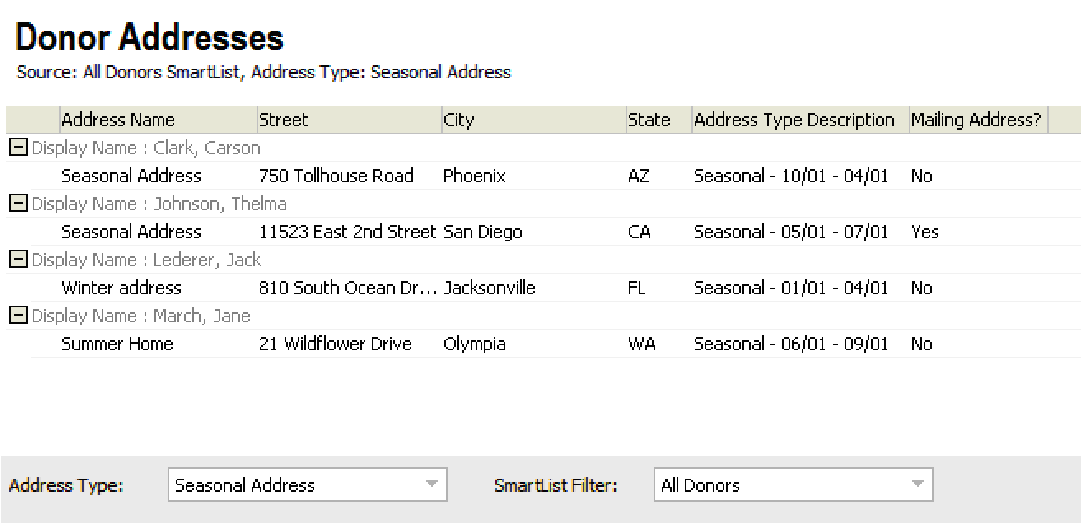
Profile	Role Type	Role	Related Donor	Related Profile	Related Role
Donor Relationships :					
Display Name : Barber, Harry					
No Profile	Work Relationship	Employee	Taylor Foundation	Organization Profile	Employer
		1			
Display Name : Batinich, Dave					
No Profile	Family Relationship	Husband	Batinich, Sharron	No Profile	Wife
		1			
Display Name : Berardi, Jon					
No Profile	Family Relationship	Husband	Berardi, Sheila	No Profile	Wife
		1			
Display Name : Berardi, Sheila					
No Profile	Work Relationship	Employee	Feed The Nations	Organization Profile	Employer
No Profile	Family Relationship	Wife	Berardi, Jon	No Profile	Husband
		2			
Display Name : Chambers, Paul					
No Profile	Family Relationship	Husband	Chambers, Rachel	No Profile	Wife
		1			
Display Name : Chambers, Rachel					

Role Type: SmartList Filter: All Donors

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Donor Addresses

This report provides a list of donors and donor addresses, and indicates if the addresses are the current mailing addresses. Choose the options for your report using the Address Type and SmartList Filter options at the bottom of the screen.



Donor Addresses

Source: All Donors SmartList, Address Type: Seasonal Address

Address Name	Street	City	State	Address Type Description	Mailing Address?
Display Name : Clark, Carson					
Seasonal Address	750 Tollhouse Road	Phoenix	AZ	Seasonal - 10/01 - 04/01	No
Display Name : Johnson, Thelma					
Seasonal Address	11523 East 2nd Street	San Diego	CA	Seasonal - 05/01 - 07/01	Yes
Display Name : Lederer, Jack					
Winter address	810 South Ocean Dr...	Jacksonville	FL	Seasonal - 01/01 - 04/01	No
Display Name : March, Jane					
Summer Home	21 Wildflower Drive	Olympia	WA	Seasonal - 06/01 - 09/01	No

Address Type: Seasonal Address SmartList Filter: All Donors

Donor Phones/Emails

This report provides a list of donor phones/emails. Choose the options for your report using the Donor SmartList Filter at the bottom of the screen.

Donor Phones/Emails

Source: All Donors SmartList

Phone/Email Name	Phone/Email Value	Primary?
Display Name : Barber, Harry		
Home Phone	(415) 673-7900	Yes
Personal Email	help@taylor.org	Yes
Display Name : Batinich, Dave		
Home Phone	(415) 567-8787	Yes
Display Name : Berardi, Jon		
Home Phone	(415) 863-9000	Yes
Personal Email	jon@bmwsf.com	Yes
Display Name : Berardi, Sheila		
Personal Email	jon@bmwsf.com	Yes
Home Phone	(415) 863-9000	Yes
Display Name : Brookes, Pete		
Personal Email	pete@davescycle.com	Yes

SmartList Filter: All Donors

Donor Tasks

View your donor tasks. Select tasks based on the due date, User and whether they are active or completed.

Donor Tasks

Source: All Donors SmartList, Dates: All Dates, User: Me, Status: Active

Display Name	Task	Notes	Due Date	Due Time	Complete
Donor Tasks :					
Bryant, Tuffy	Invite re Directed Breeds Initative	Call about specialty rescues re breed type; invite to informal meet-up.	1/29/2010	11:00:00 AM	No
Acme Super Dog Apparel	Call to Discuss Board Event		9/16/2010	4:30:00 PM	No
Millsaps, Cynthia	Invite to Puppy Mill Action		10/25/2010	6:00:00 PM	No
Hall, Brian	Call for DDFR Quotes	Call to get quotes for next year's Dog Days Fun Run	11/18/2010	5:30:00 PM	No
Bliss, Jeff	Follow Up Phone Call	Call Jeff to discuss what the "trigger" was that inspired him to make a $300.00 gift.	5/25/2011	10:30:00 AM	No
	5				

User: Me Status: Active

Due Date: All Dates SmartList Filter: All Donors

Donor Notes

View your donor notes. Select notes based on the date and user.

Donor Notes

Source: All Donors SmartList, Dates: 1/1/2011 through 12/31/2011, User: All

Title	Body	Note Date	Note Time	User
Donor Notes :				
Display Name : Coe, Steve				
Met to talk about major giving	Steve has an interest in events, but has not given to his ability. Met to ask for larger giving, had a check in hand that day!	1/24/2011	10:31:27 AM	Sample User
	1			
Display Name : Johns, James				
Grant work status update	Called Jimmy to see how the grants he is shepherding for us are coming along. He is on time and enthusiastic.	5/24/2011	10:22:45 AM	Sample User
	1			
Display Name : Mauer, Joe				
Called Joe to ask to volunteer	Joe's giving is off; asked him for volunteer time instead of dollars.	5/24/2011	10:25:47 AM	Sample User
	1			
	3			

User: | SmartList Filter: All Donors

Date: Current Year

Honorarium/Memorial Notifications

View donors who receive honorarium/memorial notifications.

Honorarium/Memorial Notifications

Source: All Donors SmartList, Honorarium/Memorial: All

Display Name	Address	City, State	ZIP/Postal Code	Phone	Email
Honorarium/Memorial Notifications :					
Honorarium/Memorial Name : Louise					
Mauer, Olivia	807 Chipom Circle	Lancaster, PA	17603	(717) 859-9878	Olivia@comcast.net
1					
Honorarium/Memorial Name : Nancy Mosso					
Dimock, Anne	1888 South Street	Lancaster, PA	17603	(717) 859-9988	Anne@comcast.net
Wilson, Anne	3 Breezy Dr	Lancaster, PA	17603	(662) 623-2523	anne@hotmail.com
2					
Honorarium/Memorial Name : Thelma and Angelamia					
Acme Super Dog Apparel	989 Acme Way	Lancaster, PA	17603	717-859-0872	ASDA@gmail.com
Kay, Alan	22 N President Ave, Apt 518	Lancaster, PA	17603	(717) 859-9999	pop@comcast.net
The Wilson and Shirley Delong…	5534 Delong Drive	Lancaster, PA	17603	(717) 253-9685	delong@hotmail.com
3					
6					

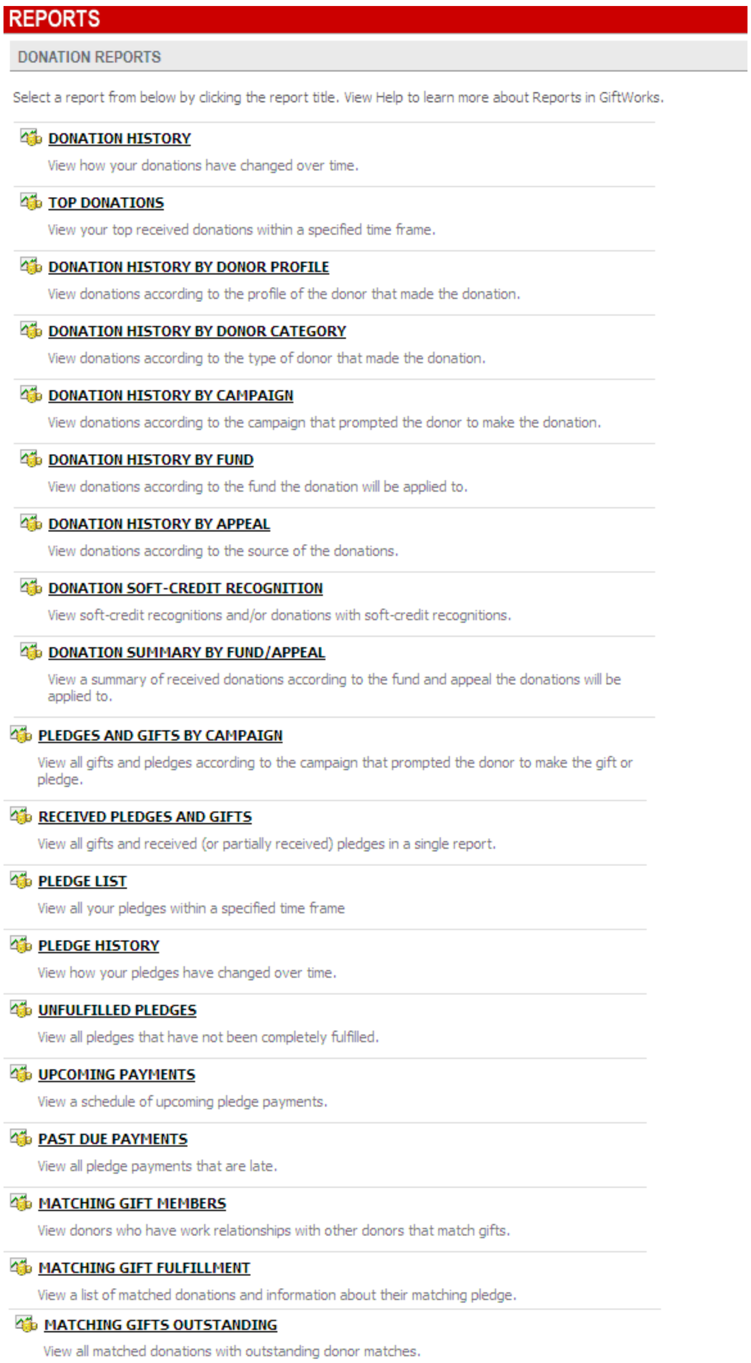
Honorarium/Memorial:

SmartList Filter: All Donors

VIEWING DONATION REPORTS

GiftWorks offers 17 different donation reports that organize donation information in a way that lets you assess your organization's fundraising effectiveness.

Click **View Donation Reports** in the work area of your main Reports screen to view a list of the available donation reports. To view any of the reports, click the report name.



Read the sections below to learn more about each donation report.

Donation History

This report lets you view how the total donations to your organization have changed over time. You can narrow your results by using the date range selection field, by selecting a specific SmartList, and by indicating the types of donations to include.

Donation History

Source: All Donations SmartList, Dates: 3/6/2007 through 3/6/2008, Include: Received Donations

Donor	Donation Type	Expected Date	Actual Date	Expected Amount	Actual Amount	Outstanding A…	Campaig
Donation History :							
Lynn, Marcus & Bridgett	Gift	3/21/2007	3/21/2007	$200.00	$200.00	$0.00	Annual
Tyler, Shawn	Gift	4/13/2007	4/13/2007	$1,000.00	$1,000.00	$0.00	Annual
Gwynn, Fred	Gift	5/20/2007	5/20/2007	$75.00	$75.00	$0.00	Annual
Berardi, Sheila	Gift	6/19/2007	6/19/2007	$100.00	$100.00	$0.00	Annual
Chambers, Rachel	Gift	8/7/2007	8/7/2007	$11,000.00	$11,000.00	$0.00	Friends
Batinich, Dave	Gift	10/16/2007	10/16/2007	$1,000.00	$1,000.00	$0.00	Annual
Lederer, Jack	Gift	10/20/2007	10/20/2007	$500.00	$500.00	$0.00	Annual
Barber, Harry	Gift	11/13/2007	11/13/2007	$125.00	$125.00	$0.00	Annual
Night, Casandra	Gift	11/14/2007	11/14/2007	$5,000.00	$5,000.00	$0.00	Campaig
Aliota, Mark	Gift	12/1/2007	12/1/2007	$50.00	$50.00	$0.00	Annual
Tipton, Lynn	Gift	12/8/2007	12/8/2007	$3,000.00	$3,000.00	$0.00	Friends
Houston, Paul	Gift	12/18/2007	12/18/2007	$250.00	$250.00	$0.00	Technol
Taylor Foundation	Gift	12/19/2007	12/19/2007	$3,000.00	$3,000.00	$0.00	Technol
Feed The Nations	Gift	12/19/2007	12/19/2007	$2,000.00	$2,000.00	$0.00	Annual
Tyler, Shawn	Gift	12/20/2007	12/20/2007	$100.00	$100.00	$0.00	Annual
Arm, Mark	Gift	12/20/2007	12/20/2007	$200.00	$200.00	$0.00	Annual
Saunders, Gretchen	Gift	12/20/2007	12/20/2007	$600.00	$600.00	$0.00	Annual

Date Range: Last 12 Months   Include: Received Donations

SmartList Filter: All Donations

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Top Donations

This report lets you view your largest received donations (gifts or pledge payments) within a specified time frame. You can choose from top 10, 25, 50, 100, 500, or all donations by SmartList. You can further narrow your results using the date range selection field.

Top Donations

Source: All Donations SmartList, Dates: All Dates, Include: Top 10 Donations

Donor	Donation Type	Actual Amount	Actual Date	Campaign	Fund	Appeal
Top Donations :						
Chambers, Rachel	Gift	$11,000.00	8/7/2007	Friends of the Family …	General Fund	Leadership Appeal 2007
Night, Casandra	Gift	$5,000.00	11/14/2007	Campaign for Capacity	Building Fund	Capacity Campaign E…
Jones, Tom & Marla	Gift	$3,000.00	10/28/2005	Annual Campaign 2005	General Fund	Board Solicitation
Taylor Foundation	Gift	$3,000.00	12/19/2007	Technology Campaign	Family Couns…	Leadership Appeal 2007
Lederer Industries	Gift	$3,000.00	12/7/2005	Campaign for Capacity	Technology F…	Board Solicitation
Tipton, Lynn	Gift	$3,000.00	12/8/2007	Friends of the Family …	Family Couns…	Leadership Appeal 2007
Thorne, Carl	Gift	$2,500.00	12/20/2005	Campaign for Capacity	Family Couns…	Child-Home Campaign…
Feed The Nations	Gift	$2,000.00	12/19/2007	Annual Campaign 2007	Building Fund	Leadership Appeal 2007
Thorne, Carl	Pledge Payment	$2,000.00	12/21/2007	Campaign for Capacity	General Fund	Leadership Appeal 2007
Thorne, Carl	Pledge Payment	$2,000.00	12/21/2007	Campaign for Capacity	General Fund	Leadership Appeal 2007
Dibiase, Mike	Gift	$2,000.00	8/10/2005	Annual Campaign 2005	General Fund	Mission Day Appeal 2…
Mercury, Fred	Gift	$2,000.00	11/12/2005	Annual Campaign 2005	General Fund	Board Solicitation
Thorne, Carl	Pledge Payment	$2,000.00	12/21/2007	Campaign for Capacity	General Fund	Leadership Appeal 2007
13		$42,500.00				

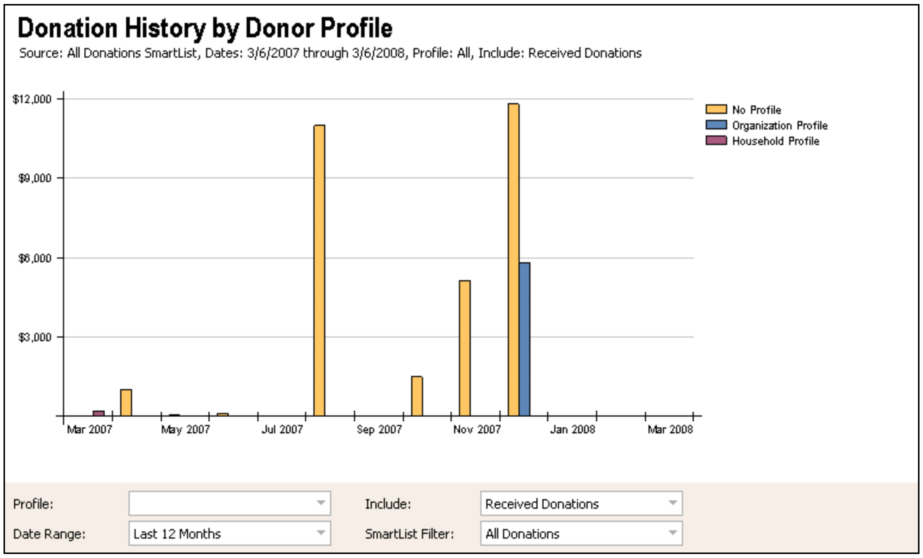
Include: Top 10 Donations   SmartList Filter: All Donations

Date Range: All Dates

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Donation History by Donor Profile

This report shows a breakdown of donations according to the profile of the donor who made the donation. You can choose one, two or all three of the profile options by SmartList. You can further narrow your results using the date range selection field and by indicating the types of donations to include.

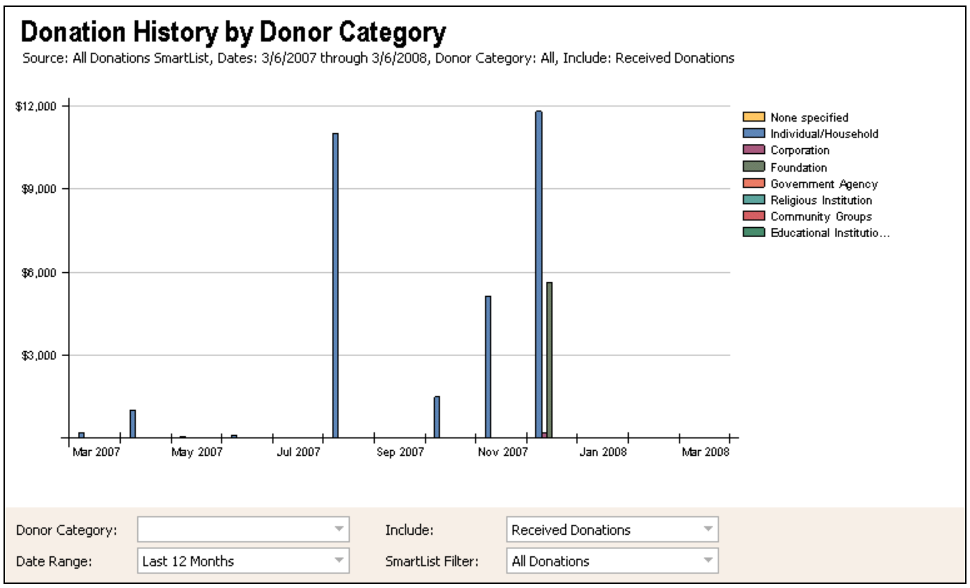


This report includes bar chart, pie chart, and line chart styles. Choose between styles by clicking **Change Report Style** in the **Related Actions** menu. The pie chart shows total donations by type of profile for the selected date range. The bar and line charts show the total donations over time, broken into time units (month, year, etc.) for each profile type.

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Donation History by Donor Category
This report shows a breakdown of donations according to the donor categories of the donors based on any or all custom categories by SmartList. You can further narrow your results using the date range selection field, and by indicating the types of donations to include.

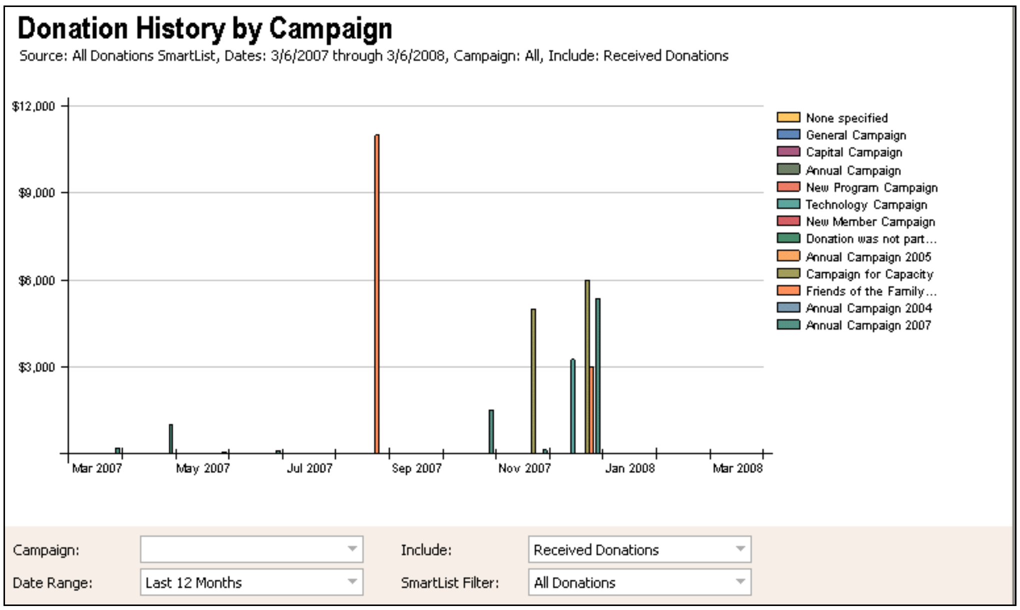
This report includes bar chart, pie chart, and line chart styles. Choose between styles by clicking **Change Report Style** in the **Related Actions** menu. The pie chart shows total donations by donor category for the selected date range. The bar and line charts show the total donations over time, broken into time units (month, year, etc.) for each donor category.



Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Donation History by Campaign
This report shows a breakdown of how donations generated by an individual campaign or several different campaigns have changed over time. You can indicate a specific campaign for your report by choosing from the campaign selection. If you choose the blank option in the campaign dropdown, the report will show data for all campaigns. You can further narrow your results by choosing a SmartList, using the date range selection field, and by indicating the types of donations to include.

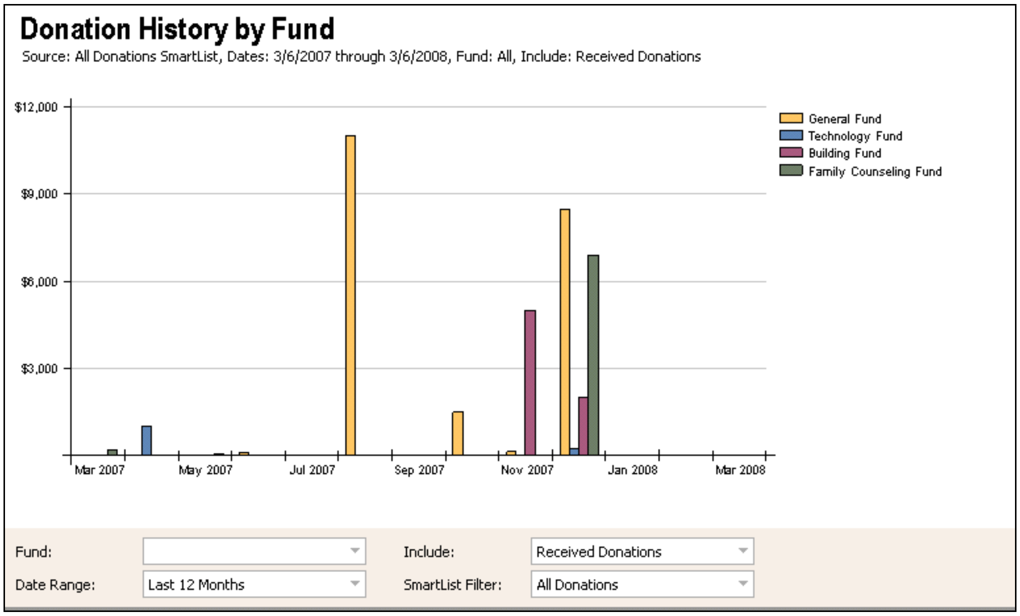
This report includes bar chart, pie chart, and line chart styles. Choose between styles by clicking **Change Report Style** in the **Related Actions** menu. The pie chart shows total donations by campaign for the selected date range. The bar and line charts show the total donations over time, broken into time units (month, year, etc.) for each campaign.



Choose the options for your report using the Report Choices screen, under Customize Donations, or at the bottom of the screen within the report.

Donation History by Fund
This report shows a breakdown of how donations to each fund have changed over time. You can indicate a specific fund for your report by choosing from the fund selection. If you choose the blank option in the fund dropdown list, the report will show information for all funds. You can further narrow your results by choosing a SmartList, using the date range selection field, and by indicating the types of donations to include.

This report includes bar chart, pie chart, and line chart styles. Choose between styles by clicking **Change Report Style** in the **Related Actions** menu. The pie chart shows total donations by fund for the selected date range. The bar and line charts show the total donations over time, broken into time units (month, year, etc.) for each fund.

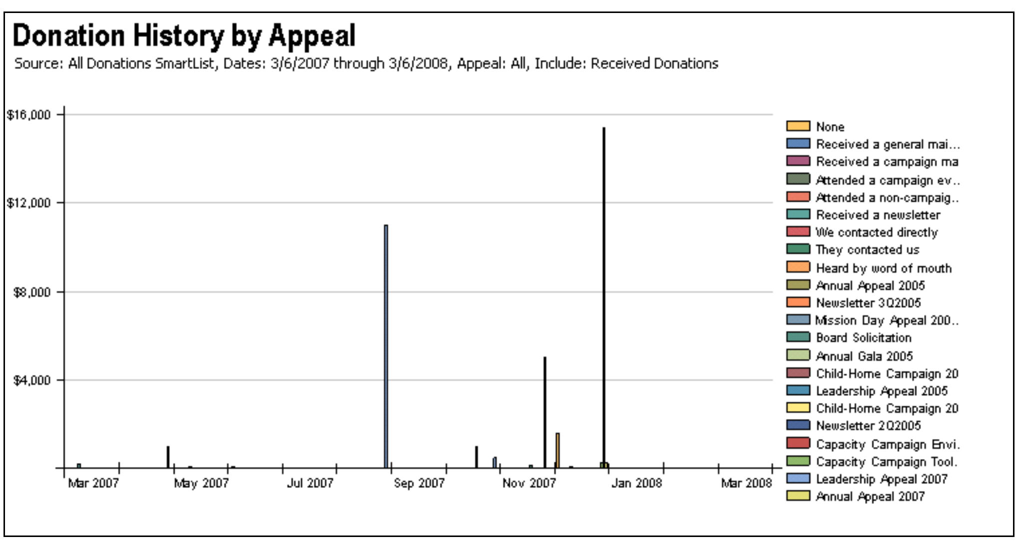


Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Donation History by Appeal

This report shows a breakdown of how donations as a result of an appeal or several appeals have changed over time. You can indicate a specific appeal for your report by choosing from the appeal selection. If you choose the blank option in the appeal dropdown list, the report will show information for all appeals. You can further narrow your results by choosing a SmartList, using the date range selection field, and by indicating the types of donations to include.

This report includes bar chart, pie chart, and line chart styles. Choose between styles by clicking **Change Report Style** in the **Related Actions** menu. The pie chart shows total donations by appeal for the selected date range. The bar and line charts show the total donations over time, broken into time units (month, year, etc.) for each appeal.



Choose the options for your report using the Report Choices screen or at the bottom of the screen within the report.

Donation Soft-Credit Recognition

This report shows soft-credit recognitions and/or donations with soft-credit recognitions. You can further narrow your results by choosing a SmartList, using the date range selection field, and by indicating the types of donations to include.

Donation Soft-Credit Recognition

Source: All Donations SmartList, Dates: 1/1/2011 through 12/31/2011, Include: Soft-Credits and Donations w/ Soft-Credits

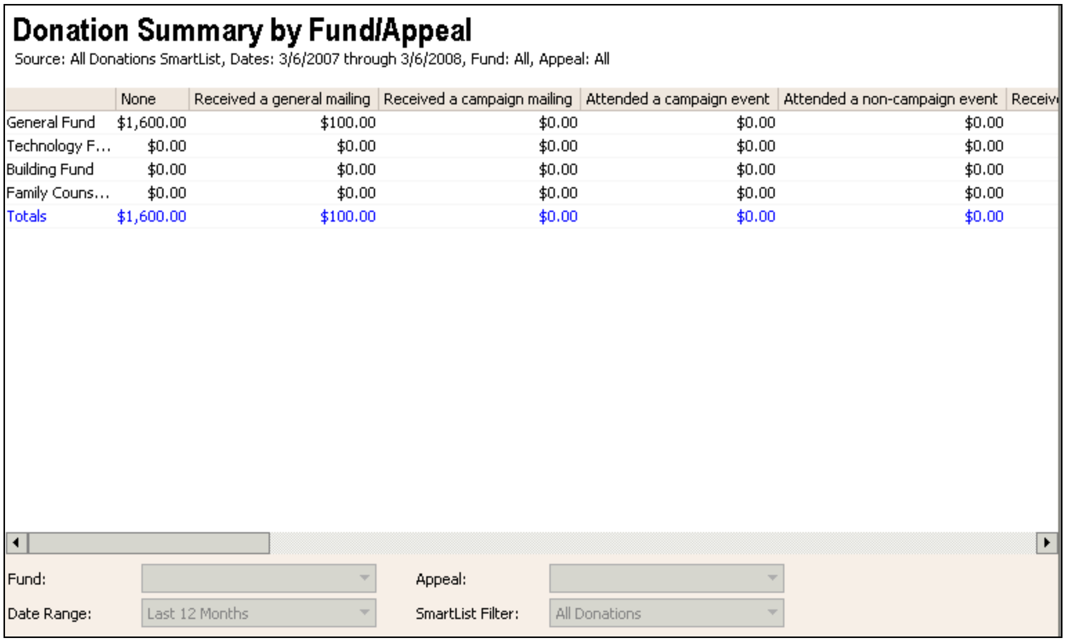
Credit Type	Donation Type	Credit Donor	Credit Amount	Primary Donor	Actual Date	Actual Amount	Campaign
Donation Soft-Credit Recognition :							
Donation	Gift	The Wilson Family	$600.00	The Wilson Family	7/12/2011	$600.00	2011 Annual
Soft-Credit	Gift	Wilson, Georgia	$600.00	The Wilson Family	7/12/2011	$600.00	2011 Annual
Soft-Credit	Gift	Wilson, Gerda	$600.00	The Wilson Family	7/12/2011	$600.00	2011 Annual
Donation	Gift	Save The Dogs Foundation	$200.00	Save The Dogs Foundation	7/12/2011	$200.00	2011 Annual
Soft-Credit	Gift	Fairborne, Storm	$200.00	Save The Dogs Foundation	7/12/2011	$200.00	2011 Annual
Donation	Gift	Save The Dogs Foundation	$1,000.00	Save The Dogs Foundation	7/12/2011	$1,000.00	2011 Annual
Soft-Credit	Gift	Cellinson, Violet	$1,000.00	Save The Dogs Foundation	7/12/2011	$1,000.00	2011 Annual
Donation	Gift	Dash, Rachel	$5.00	Dash, Rachel	9/19/2011	$5.00	2011 Annual
Soft-Credit	Gift	Arvitolie, Benjamin and Pansy	$5.00	Dash, Rachel	9/19/2011	$5.00	2011 Annual
Donation	Gift	Dash, Rachel	$50.00	Dash, Rachel	9/28/2011	$50.00	2011 Annual
Soft-Credit	Gift	Arvitolie, Benjamin and Pansy	$50.00	Dash, Rachel	9/28/2011	$50.00	2011 Annual
		11	$4,310.00			$4,310.00	

Include: Soft-Credits and Donations w/ SmartList Filter: All Donations

Donation Date: Current Year

Donation Summary by Fund/Appeal

This report shows a breakdown of donations per fund and appeal. You can indicate specific funds and/or appeals for your report by choosing from the fund and appeal list selections. If you choose a blank option in either the fund or appeal dropdown list, the report will show information for all funds and/or appeals. You can further narrow your results by choosing a SmartList or using the date range selection field.



Donation Summary by Fund/Appeal

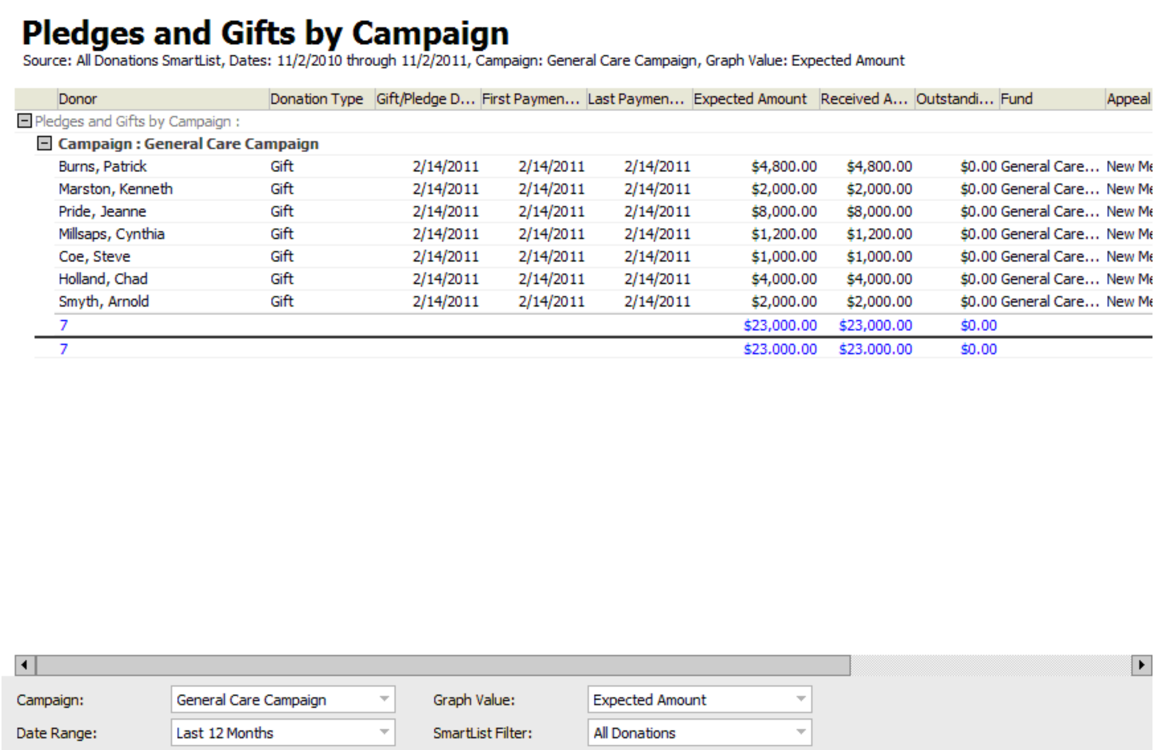
Source: All Donations SmartList, Dates: 3/6/2007 through 3/6/2008, Fund: All, Appeal: All

	None	Received a general mailing	Received a campaign mailing	Attended a campaign event	Attended a non-campaign event	Receiv
General Fund	$1,600.00	$100.00	$0.00	$0.00	$0.00	
Technology F…	$0.00	$0.00	$0.00	$0.00	$0.00	
Building Fund	$0.00	$0.00	$0.00	$0.00	$0.00	
Family Couns…	$0.00	$0.00	$0.00	$0.00	$0.00	
Totals	$1,600.00	$100.00	$0.00	$0.00	$0.00	

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Pledges and Gifts By Campaign

View all gifts and pledges according to the campaign that prompted the donor to make the gift or pledge.



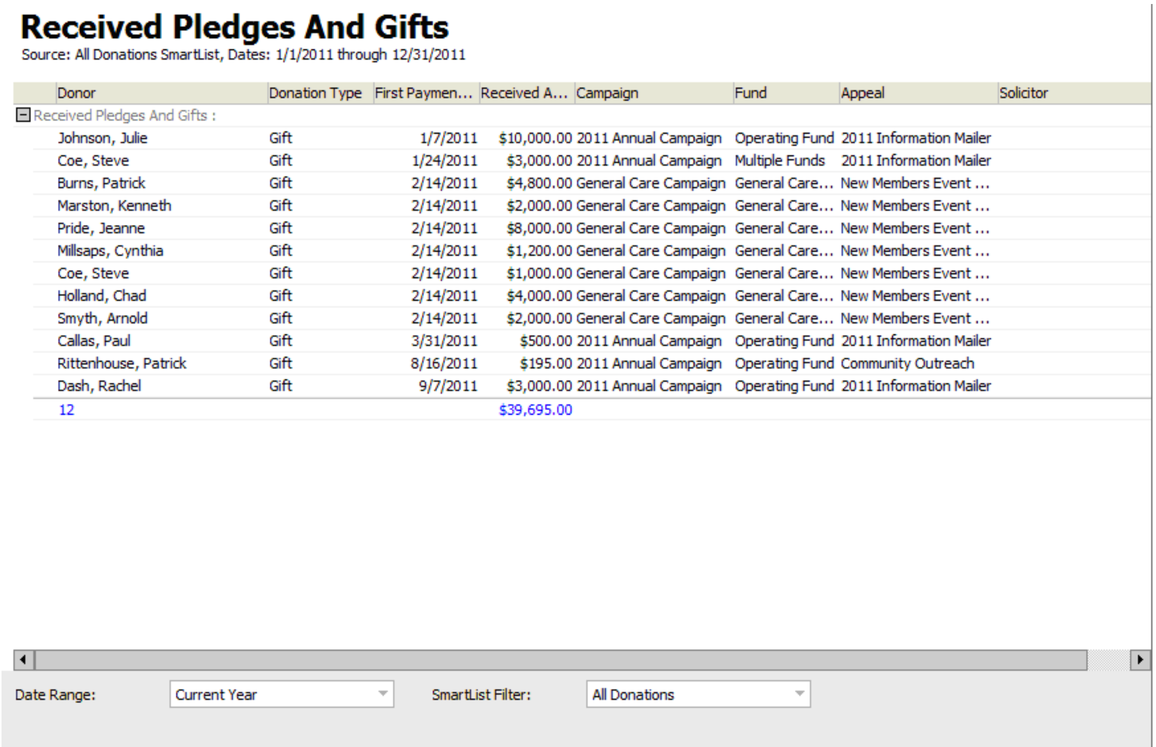
Pledges and Gifts by Campaign

Source: All Donations SmartList, Dates: 11/2/2010 through 11/2/2011, Campaign: General Care Campaign, Graph Value: Expected Amount

Donor	Donation Type	Gift/Pledge D…	First Paymen…	Last Paymen…	Expected Amount	Received A…	Outstandi…	Fund	Appeal
Pledges and Gifts by Campaign :									
Campaign : General Care Campaign									
Burns, Patrick	Gift	2/14/2011	2/14/2011	2/14/2011	$4,800.00	$4,800.00	$0.00	General Care…	New Me
Marston, Kenneth	Gift	2/14/2011	2/14/2011	2/14/2011	$2,000.00	$2,000.00	$0.00	General Care…	New Me
Pride, Jeanne	Gift	2/14/2011	2/14/2011	2/14/2011	$8,000.00	$8,000.00	$0.00	General Care…	New Me
Millsaps, Cynthia	Gift	2/14/2011	2/14/2011	2/14/2011	$1,200.00	$1,200.00	$0.00	General Care…	New Me
Coe, Steve	Gift	2/14/2011	2/14/2011	2/14/2011	$1,000.00	$1,000.00	$0.00	General Care…	New Me
Holland, Chad	Gift	2/14/2011	2/14/2011	2/14/2011	$4,000.00	$4,000.00	$0.00	General Care…	New Me
Smyth, Arnold	Gift	2/14/2011	2/14/2011	2/14/2011	$2,000.00	$2,000.00	$0.00	General Care…	New Me
7					$23,000.00	$23,000.00	$0.00		
7					$23,000.00	$23,000.00	$0.00		

Received Pledges and Gifts

View all gifts and received (or partially received) pledges in a single report.



Received Pledges And Gifts

Source: All Donations SmartList, Dates: 1/1/2011 through 12/31/2011

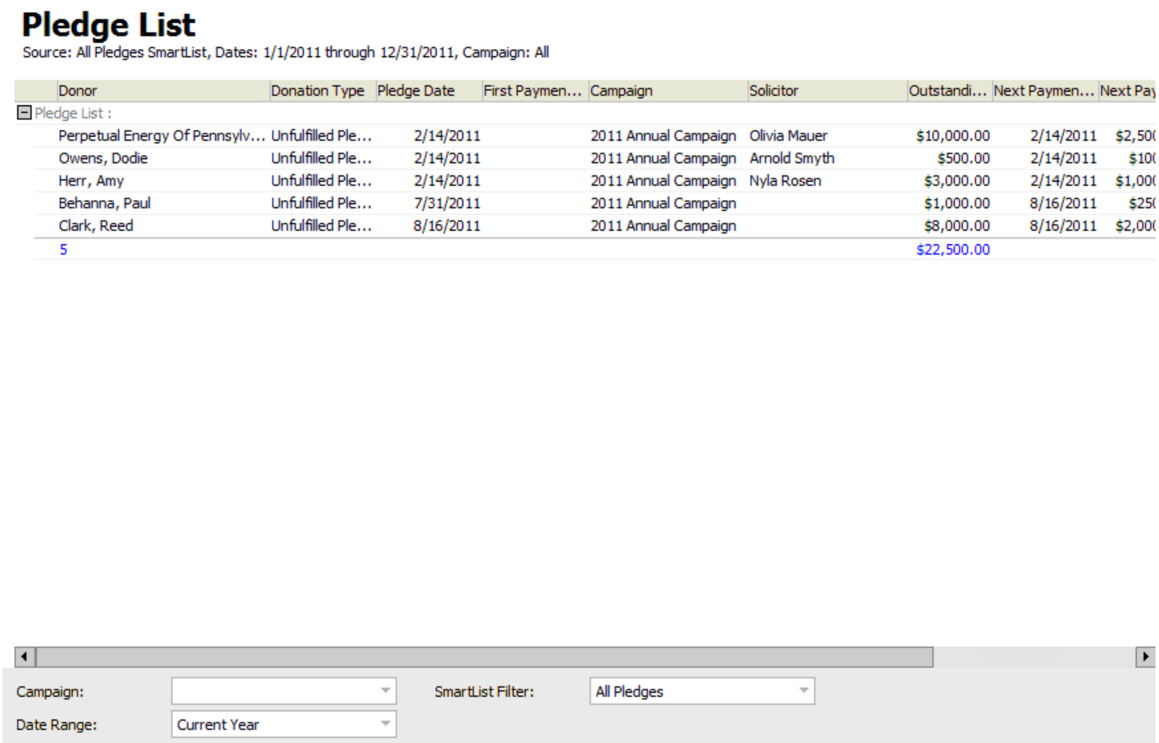
Donor	Donation Type	First Paymen...	Received A...	Campaign	Fund	Appeal	Solicitor
Received Pledges And Gifts :							
Johnson, Julie	Gift	1/7/2011	$10,000.00	2011 Annual Campaign	Operating Fund	2011 Information Mailer	
Coe, Steve	Gift	1/24/2011	$3,000.00	2011 Annual Campaign	Multiple Funds	2011 Information Mailer	
Burns, Patrick	Gift	2/14/2011	$4,800.00	General Care Campaign	General Care...	New Members Event ...	
Marston, Kenneth	Gift	2/14/2011	$2,000.00	General Care Campaign	General Care...	New Members Event ...	
Pride, Jeanne	Gift	2/14/2011	$8,000.00	General Care Campaign	General Care...	New Members Event ...	
Millsaps, Cynthia	Gift	2/14/2011	$1,200.00	General Care Campaign	General Care...	New Members Event ...	
Coe, Steve	Gift	2/14/2011	$1,000.00	General Care Campaign	General Care...	New Members Event ...	
Holland, Chad	Gift	2/14/2011	$4,000.00	General Care Campaign	General Care...	New Members Event ...	
Smyth, Arnold	Gift	2/14/2011	$2,000.00	General Care Campaign	General Care...	New Members Event ...	
Callas, Paul	Gift	3/31/2011	$500.00	2011 Annual Campaign	Operating Fund	2011 Information Mailer	
Rittenhouse, Patrick	Gift	8/16/2011	$195.00	2011 Annual Campaign	Operating Fund	Community Outreach	
Dash, Rachel	Gift	9/7/2011	$3,000.00	2011 Annual Campaign	Operating Fund	2011 Information Mailer	
12			$39,695.00				

Date Range: Current Year

SmartList Filter: All Donations

Pledge List

View all your pledges within a specified time frame.



Pledge List

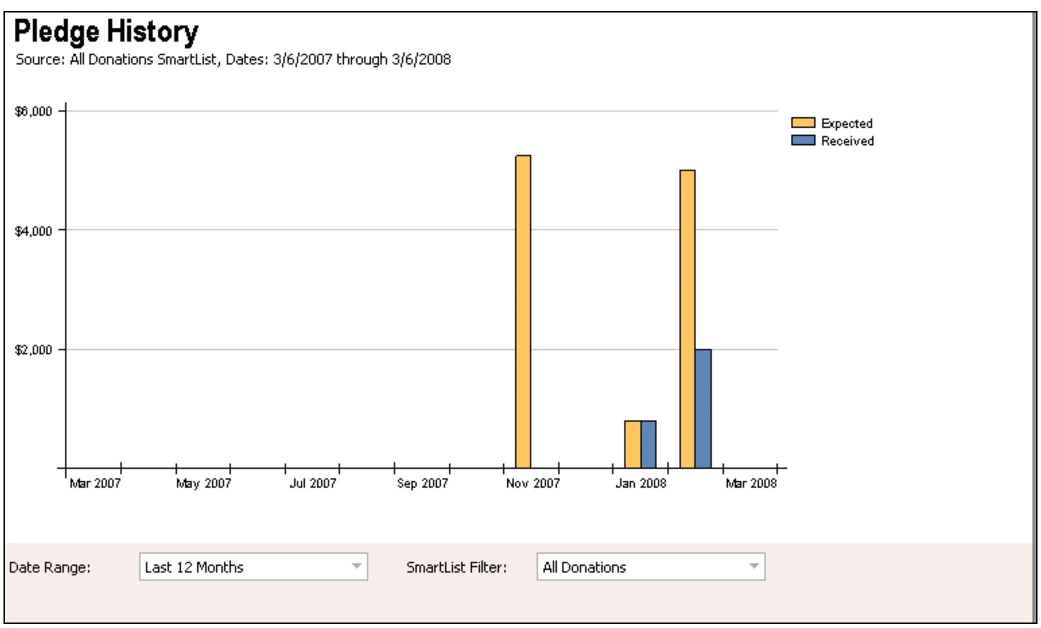
Source: All Pledges SmartList, Dates: 1/1/2011 through 12/31/2011, Campaign: All

Donor	Donation Type	Pledge Date	First Paymen...	Campaign	Solicitor	Outstandi...	Next Paymen...	Next Pay
Pledge List :								
Perpetual Energy Of Pennsylv...	Unfulfilled Ple...	2/14/2011		2011 Annual Campaign	Olivia Mauer	$10,000.00	2/14/2011	$2,50(
Owens, Dodie	Unfulfilled Ple...	2/14/2011		2011 Annual Campaign	Arnold Smyth	$500.00	2/14/2011	$10(
Herr, Amy	Unfulfilled Ple...	2/14/2011		2011 Annual Campaign	Nyla Rosen	$3,000.00	2/14/2011	$1,00(
Behanna, Paul	Unfulfilled Ple...	7/31/2011		2011 Annual Campaign		$1,000.00	8/16/2011	$25(
Clark, Reed	Unfulfilled Ple...	8/16/2011		2011 Annual Campaign		$8,000.00	8/16/2011	$2,00(
5						$22,500.00		

Campaign:
SmartList Filter: All Pledges
Date Range: Current Year

Pledge History

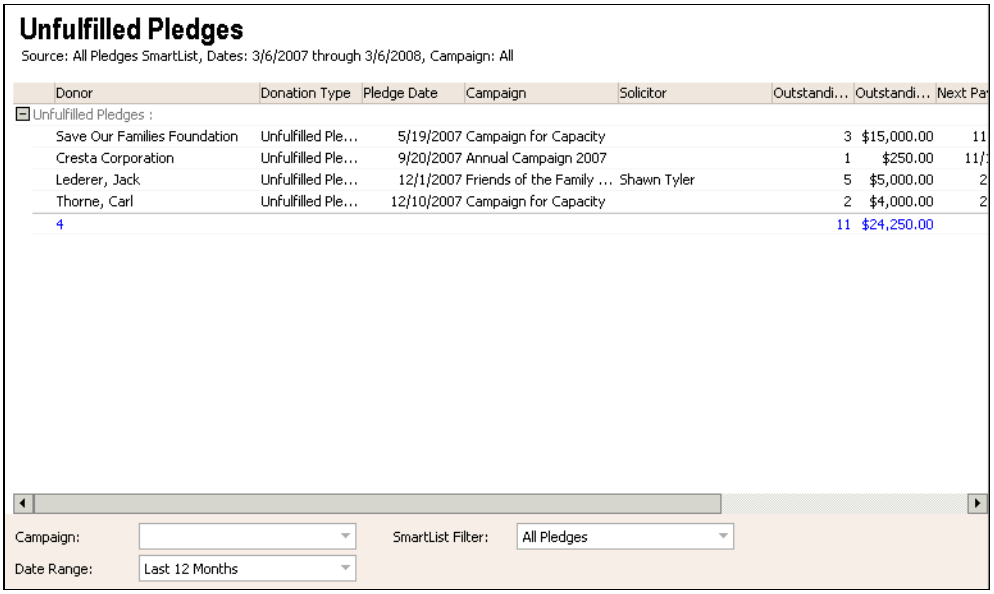
This report shows you a breakdown of how expected pledge payments to your organization have changed over time. The bar chart style of this report further breaks down the pledge information by expected amounts and how much of the expected amounts have been received. This lets you see if your donors have made their expected payments. You can further narrow your results using the date range selection field, or by choosing a SmartList.



Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Unfulfilled Pledges

This report lets you see a list of pledges with outstanding payments from a specific SmartList.. You can further narrow your results using the date range selection field, and by selecting a specific SmartList and/or campaign. If you choose the blank option in the campaign dropdown list, the report will include information for all campaigns.



Unfulfilled Pledges

Source: All Pledges SmartList, Dates: 3/6/2007 through 3/6/2008, Campaign: All

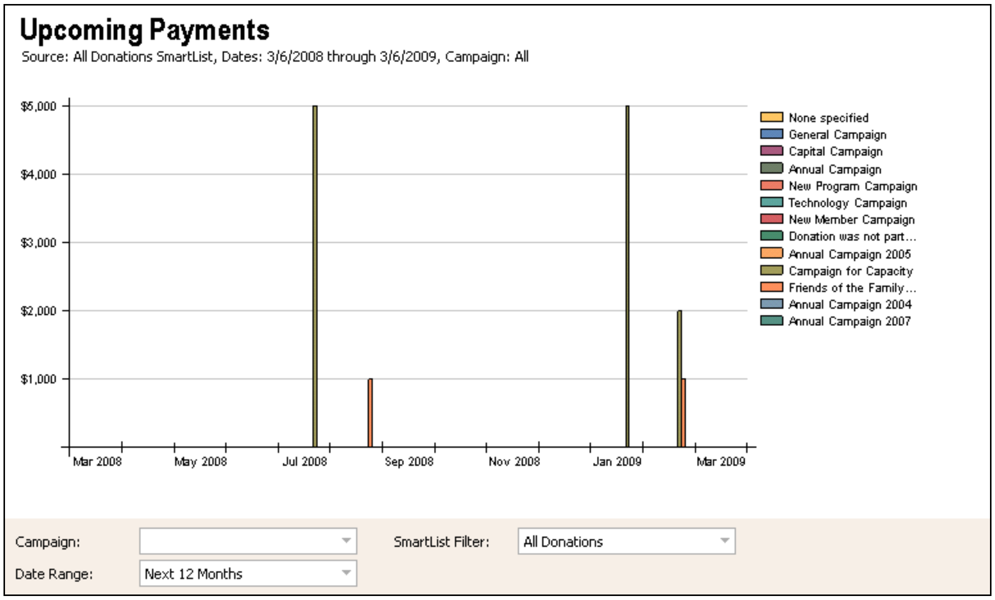
Donor	Donation Type	Pledge Date	Campaign	Solicitor	Outstandi…	Outstandi…	Next Pa
Unfulfilled Pledges :							
Save Our Families Foundation	Unfulfilled Ple…	5/19/2007	Campaign for Capacity		3	$15,000.00	11
Cresta Corporation	Unfulfilled Ple…	9/20/2007	Annual Campaign 2007		1	$250.00	11/
Lederer, Jack	Unfulfilled Ple…	12/1/2007	Friends of the Family …	Shawn Tyler	5	$5,000.00	2
Thorne, Carl	Unfulfilled Ple…	12/10/2007	Campaign for Capacity		2	$4,000.00	2
4					11	$24,250.00	

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Upcoming Payments

This report shows the upcoming scheduled pledge payments for pledges made to your organization. You can further narrow your results using the date range selection field, and by selecting a specific SmartList and/or campaign. If you choose the blank option in the campaign dropdown list, the report will show information for all campaigns.

This report includes a bar chart and pie chart. The pie chart shows totals by campaign for the date range. The bar charts show the totals over time (by month, year, etc.) for each campaign.

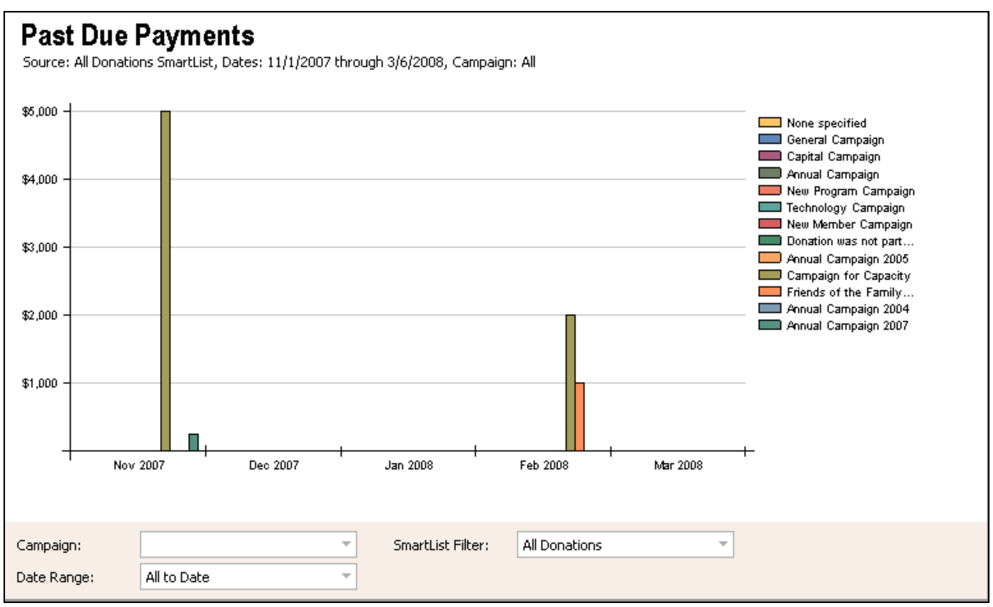


Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Past Due Payments

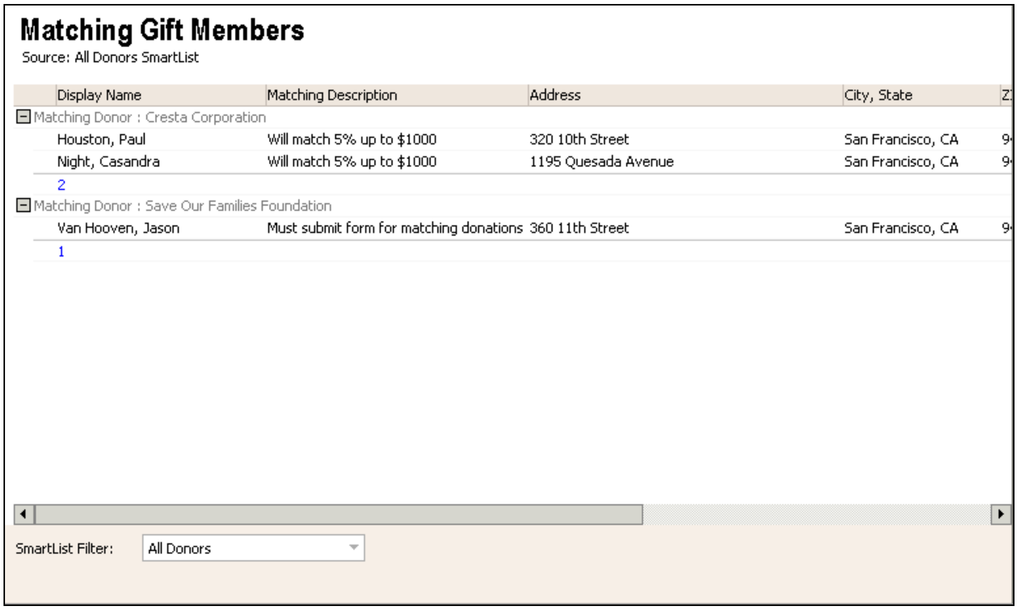
This report lets you keep track of overdue pledge payments. You can further narrow your results using the date range selection field, and by selecting a specific SmartList and/or campaign. If you choose the blank option in the campaign dropdown list, the report will show information for all campaigns.

This report includes a bar chart and pie chart. The pie chart shows totals by campaign for the date range. The bar charts show the totals over time (by month, year, etc.) for each campaign.



Choose the options for your report using the Report Choices screen, under Customize Reports, or at the bottom of the screen within the report.

Matching Gift Members
This report shows a list of donors associated with other donors that match gifts. You can run this report on any SmartList.

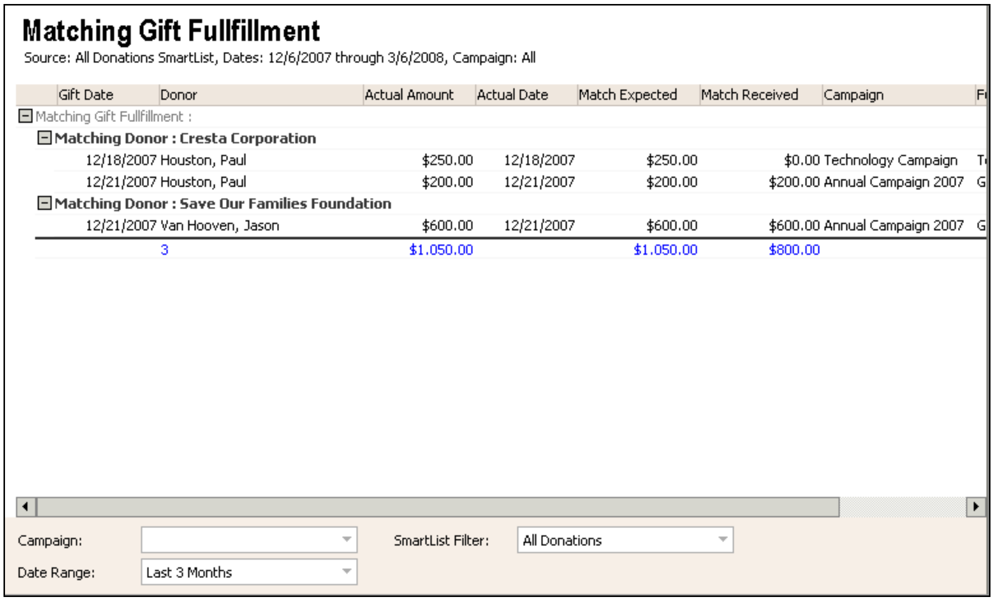

Matching Gift Members
Source: All Donors SmartList

Display Name	Matching Description	Address	City, State	ZI
Matching Donor : Cresta Corporation				
Houston, Paul	Will match 5% up to $1000	320 10th Street	San Francisco, CA	9
Night, Casandra	Will match 5% up to $1000	1195 Quesada Avenue	San Francisco, CA	9
2				
Matching Donor : Save Our Families Foundation				
Van Hooven, Jason	Must submit form for matching donations	360 11th Street	San Francisco, CA	9
1				

SmartList Filter: All Donors

Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

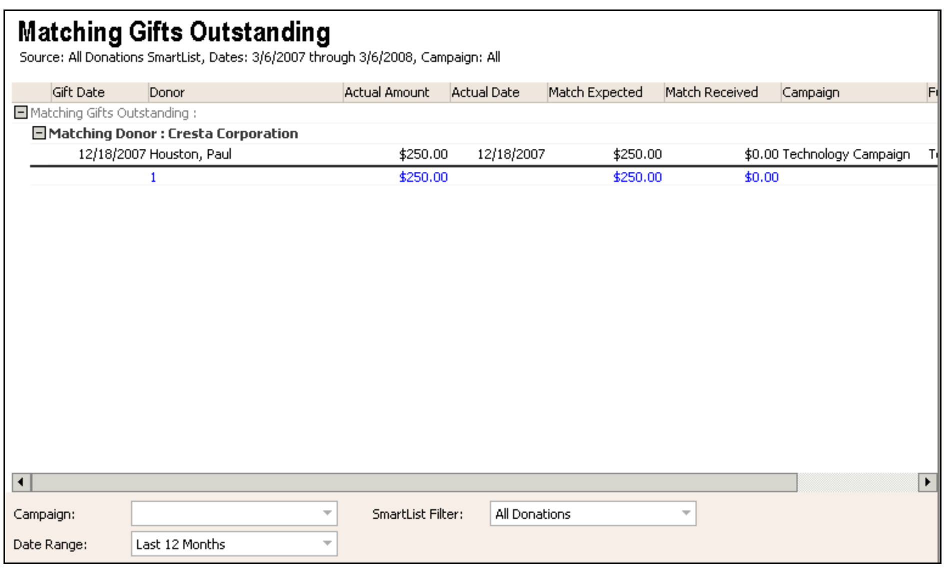
Matching Gift Fulfillment
This report shows a breakdown of all matched donations, plus information about the matching pledge for each. You can further narrow your results using the date range selection field, and by selecting a specific SmartList and/or campaign. If you choose the blank option in the campaign dropdown list, the report shows information for all campaigns.



Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

Matching Gifts Outstanding

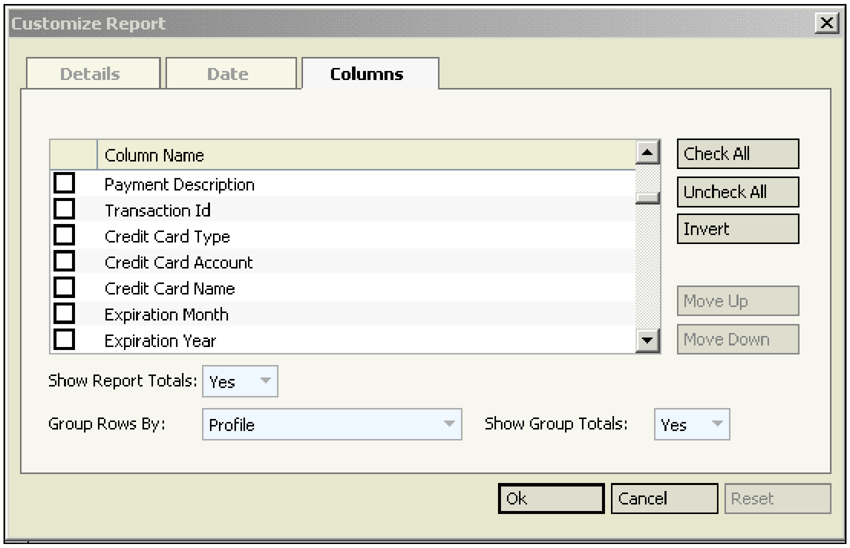
This report shows a breakdown of matched donations whose matching pledges have payments that are overdue. You can further narrow your results using the date range selection field, and by selecting a specific SmartList and/or campaign. If you choose the blank option in the campaign dropdown list, the report shows information for all campaigns.



Choose the options for your report using the Report Choices screen, under Customize Report, or at the bottom of the screen within the report.

CUSTOMIZING DONOR AND DONATION REPORTS

You can customize donor and donation reports by choosing **Customize Report** located on the left under **Related Actions**.



The Details tab lets you choose the SmartList with the data you want to view in the report. You can also select whether you want to choose report options each time you view this report. If you uncheck the box, the currently selected SmartList will always be used by default for this report.

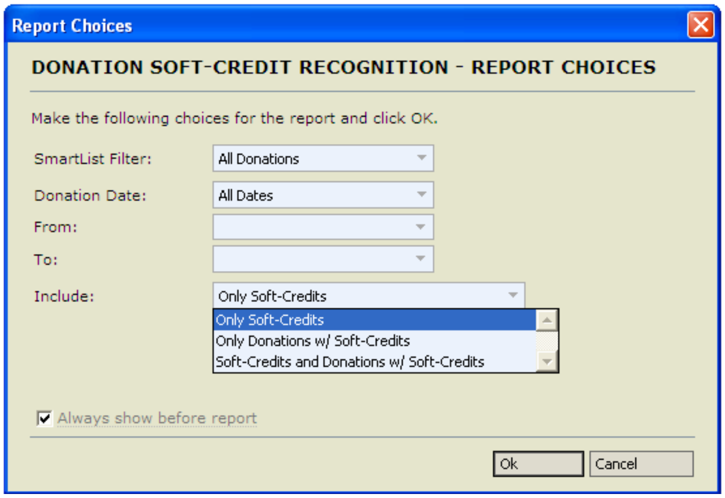
For certain reports, you can choose date options on the Date tab. You can choose time units to organize the report data by (days, weeks, months, quarters, years, etc.), and date ranges for the report.

From the Columns tab, you can choose to add or remove columns displayed on the report. You can also choose to show totals for the report, whether and how to group the data, and, if it is grouped, whether to show group totals.

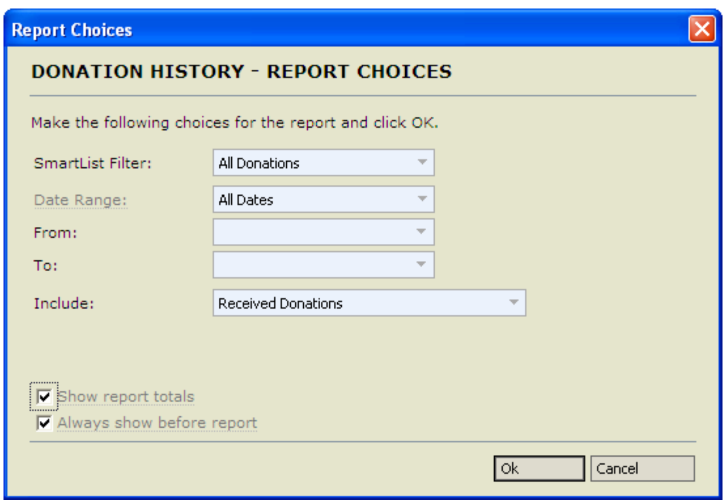
Some specialized reports (such as Donors by Giving Level) include additional tabs for customizing the report. Search GiftWorks help for the report title for specific information about each report.

Some reports also include customization options in drop-down lists at the bottom of the report window, such as date range or SmartList.

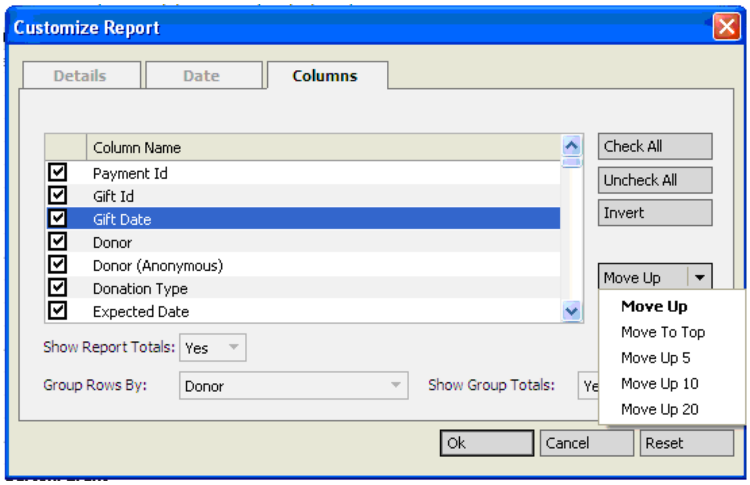
Displaying Soft-Credits in Reports: Soft credit donations will be available on certain reports and be optionally included in total giving for reports.



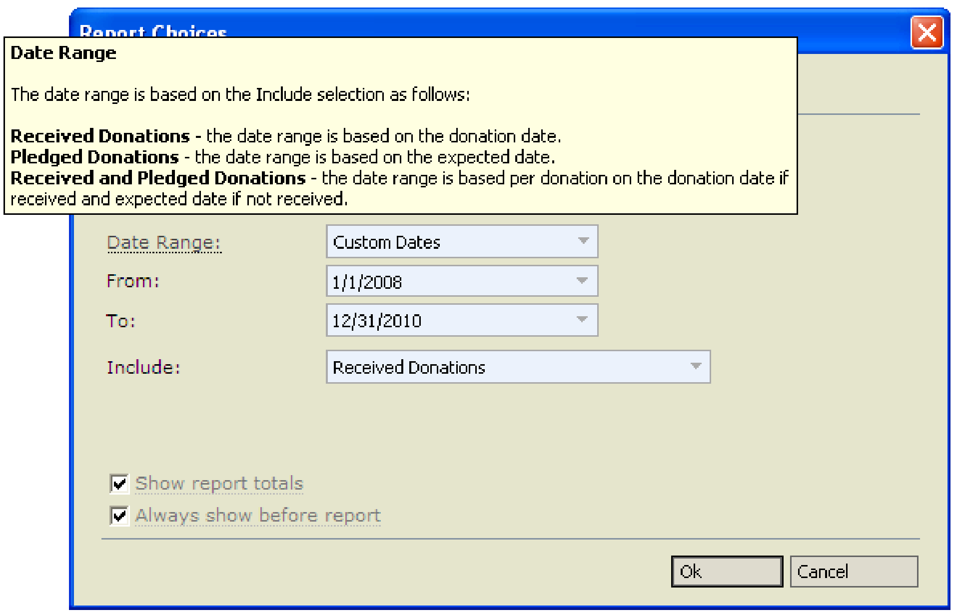
New “Show Report Totals” check box when setting up Report Choices – must check this box in order for the totals to show on Graphs/Charts – also this will “round up” the totals



New “Move Up/Move Down” options when customizing Reports:



The Date Range now has an explanation-hover your mouse over the Date Range area to see this.

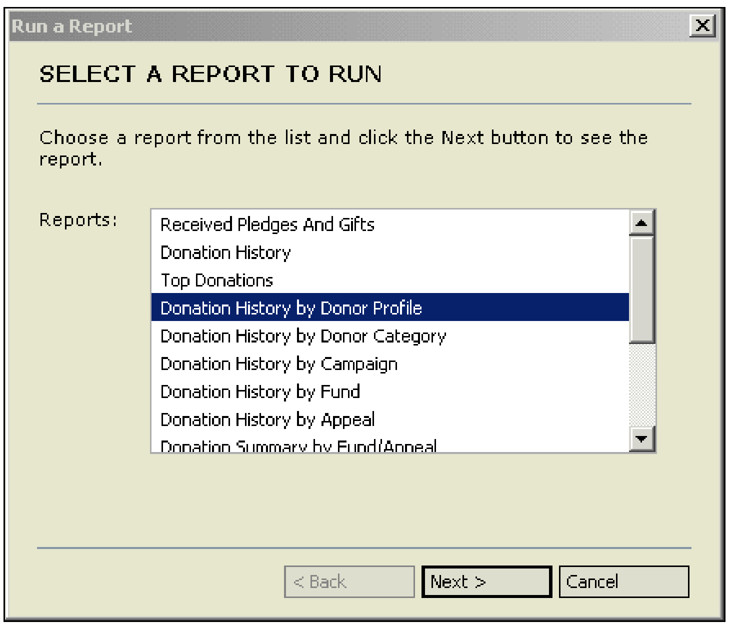


RUNNING A REPORT ON A SMARTLIST

Depending on the SmartList you're viewing (whether it's a donor, donation, or pledge SmartList), you can run certain reports directly on that SmartList. When browsing a SmartList, click **Run Report for List** in the **Related Actions** menu. GiftWorks will give you a list of the reports that can be run on that list. This gives you the ability to get deeper information about a SmartList.

To run a report on a SmartList, open a view of the SmartList. Then, from the **Related Actions** menu, click **Run Report for List**.

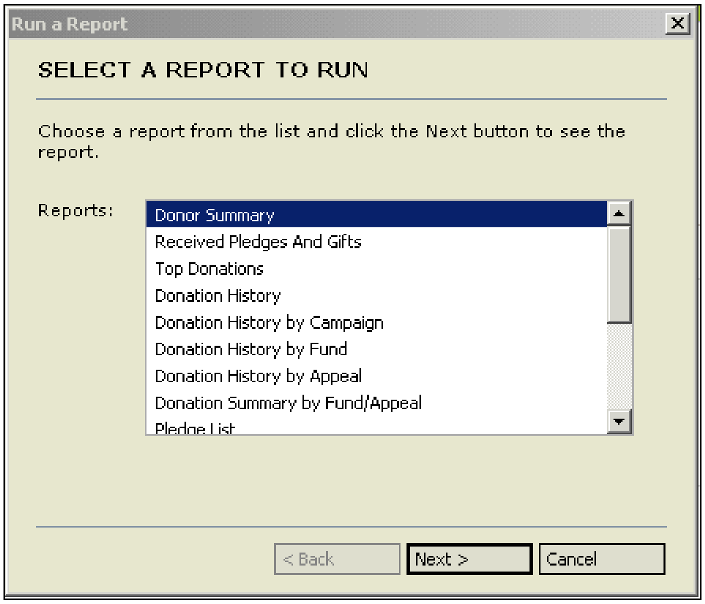
Choose from the list of reports in the next screen to view the desired report and click **Next** to continue. Your SmartList report is now ready for viewing and customization.



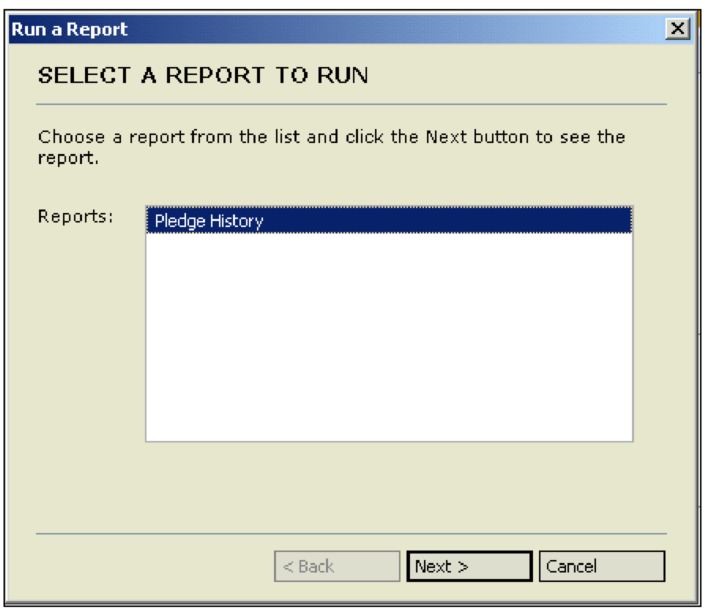
RUNNING A REPORT ON A DONOR

With GiftWorks, you can create reports from a donor, donation, or pledge record.. Reports range from a summary report of the donor's information, to a comprehensive view of a donor's total giving history.

Donor Report: Open a donor record and click **Run a Report** from the menu on the left. Choose from the list of reports that will provide visuals of information taken from the open donor record.

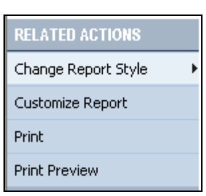


Donation/Pledge Report: Open a donation/gift, pledge, or pledge payment record. Click **Run a Report** from the menu on the left. You will have different report options depending on the type of record you were viewing.



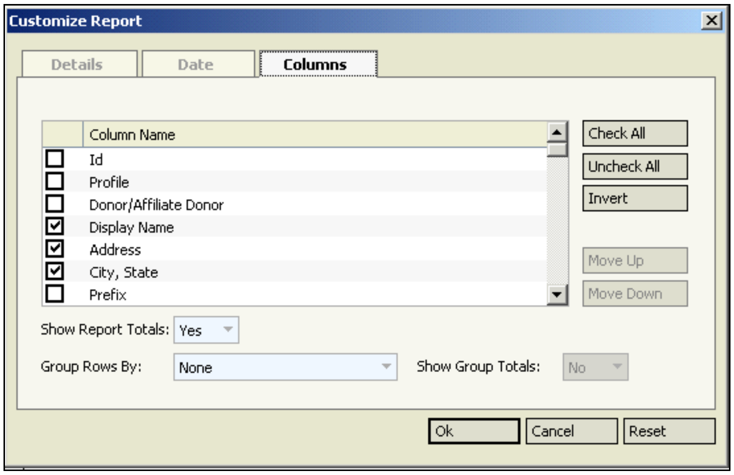
CHOOSING A REPORT STYLE

Once you run a report, you can choose the viewing style. Click **Change Report Style** in the **Related Actions** menu on the left.



Most reports have a list view that shows a list of the records that make up your report. The information in the list style report can be sorted for a view that suits your preferences. Simply click on the column heading by which your information should be sorted.

You can further customize the following information in your reports by clicking **Customize Report** in the **Related Actions** menu:

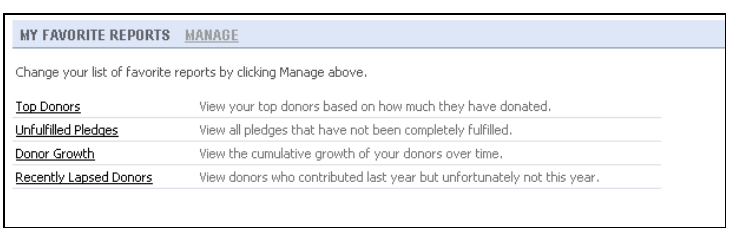


- Change the columns of information shown in the list style. From the Columns tab in the Customize Report window, click the checkboxes next to the columns you want to view.
- Indicate which fields are totaled using groups and totals by adjusting the settings on the Columns tab.
- Select a specific date range for reports that show information plotted over time. From the Date tab in the Customize Report window, use the drop-down menus to select the date range for the information you want to view. You can also adjust the time unit used to generate your report by clicking the Details tab and selecting the desired time unit from the drop-down menu.
- Choose the monetary value for the donations included in the report. From the Details tab, select the value for your report by choosing from the drop-down menu.

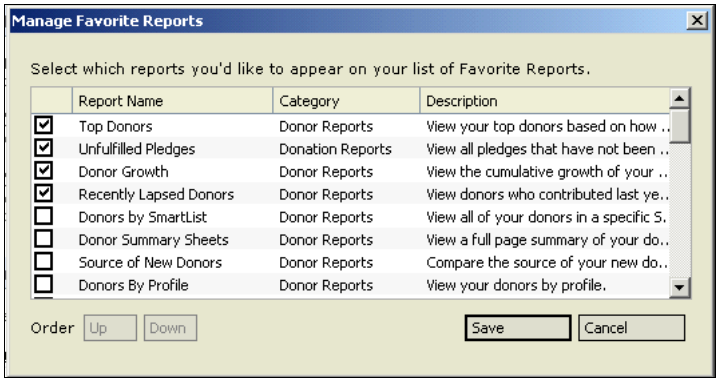
Reports with data that can be quantified have an available graphical representation of your information. These reports also have a summary view that lets you see the table the graph was generated from.

VIEWING MY FAVORITE REPORTS

My Favorite Reports, available in the work area of the main Reports screen, offers quick access to your favorite reports.

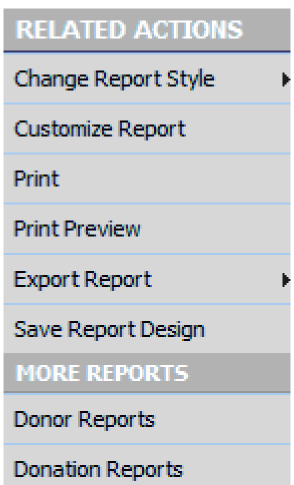


You can choose your favorite reports by clicking **Manage** in the My Favorite Reports header, then clicking the checkbox beside each report you want to appear in the favorites section.



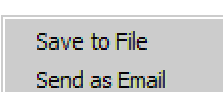
PRINTING AND EXPORTING REPORTS

You can print any style of report by clicking **Print** in the **Related Actions** menu on the left. When you print a report, you have the option of changing the heading and subheading.



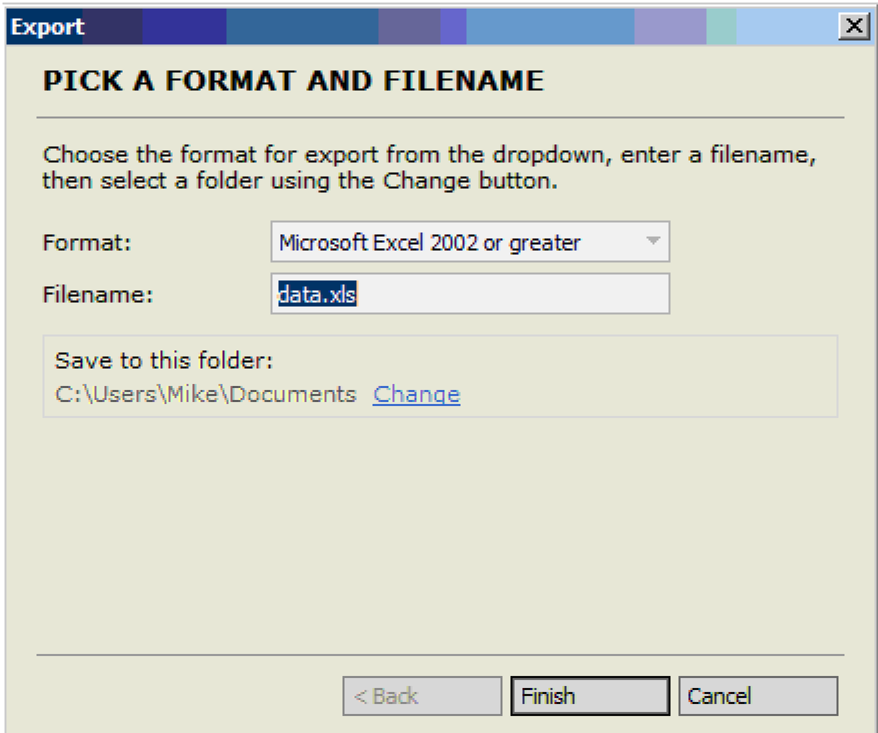
You can also export reports to another file format. First, view your report in list style by clicking **Change Report Style** in Related Actions. The Export Report option will then be available in the **Related Actions** menu. You can export in XML, .csv, or Microsoft Excel format, and choose the location for your list to be saved.

When you click on Export Report you will have the option to 'Save to File' or "Send as Email'



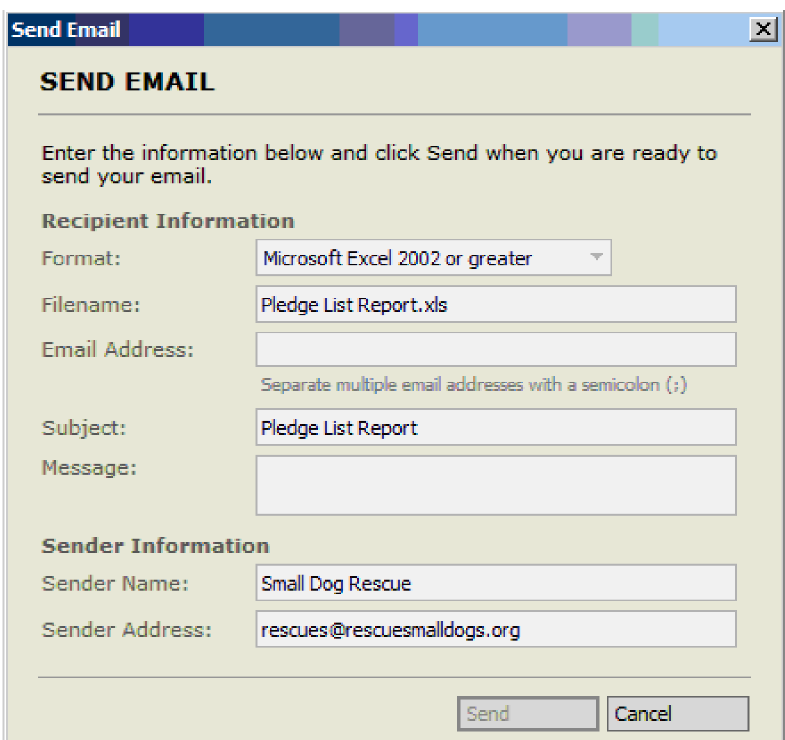
Save to File

Choose the format and filename. Click the 'Change' link to choose where to save the file onto your computer.



Send as Email

You can email the Report as an attachment. Choose the format and filename. Enter in the email address of the recipient as well as a Subject. Fill out the Sender Information and click Send.

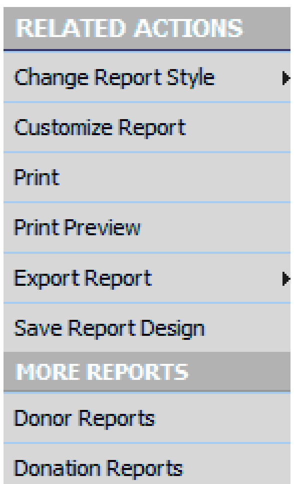


SAVING REPORT FORMATS

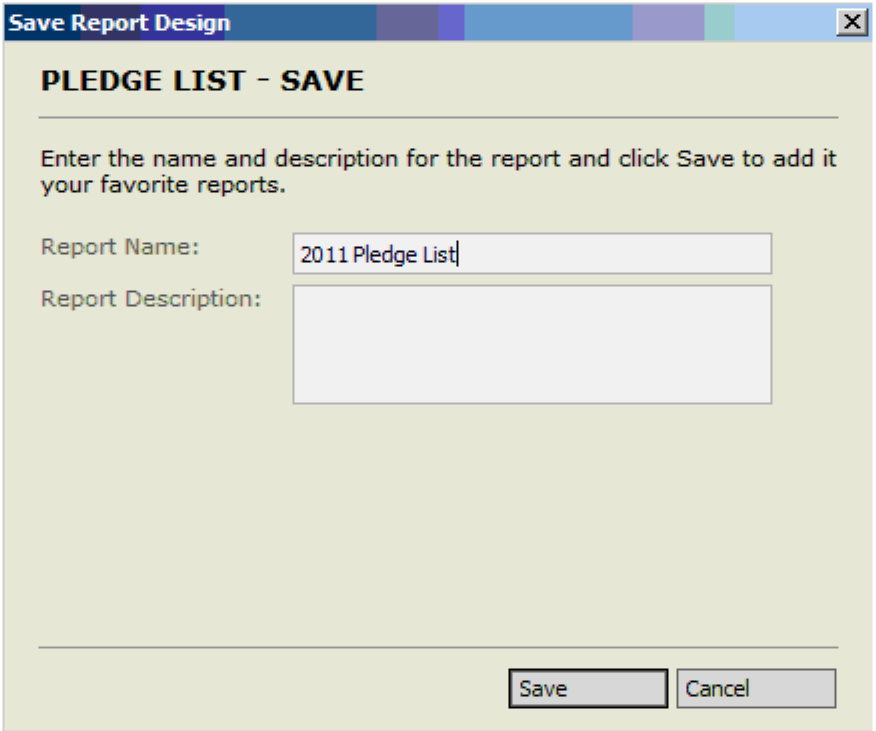
Each User can save a report just how they like it and quickly produce a report with their personal settings - This enhancement will provide each user with the ability to save the specific format customizations for a report, providing a name and description to identify the customizations. A report could have more than one format saved. The user will be allowed to select from these saved formats whenever the report is run. Also, users will be able to manage these report formats.

The Saved Report Formats will be added to your 'My Favorite Reports' area
***NOTE: you will not see an option to Save the Report if you created the Report FROM the SmartList screen.

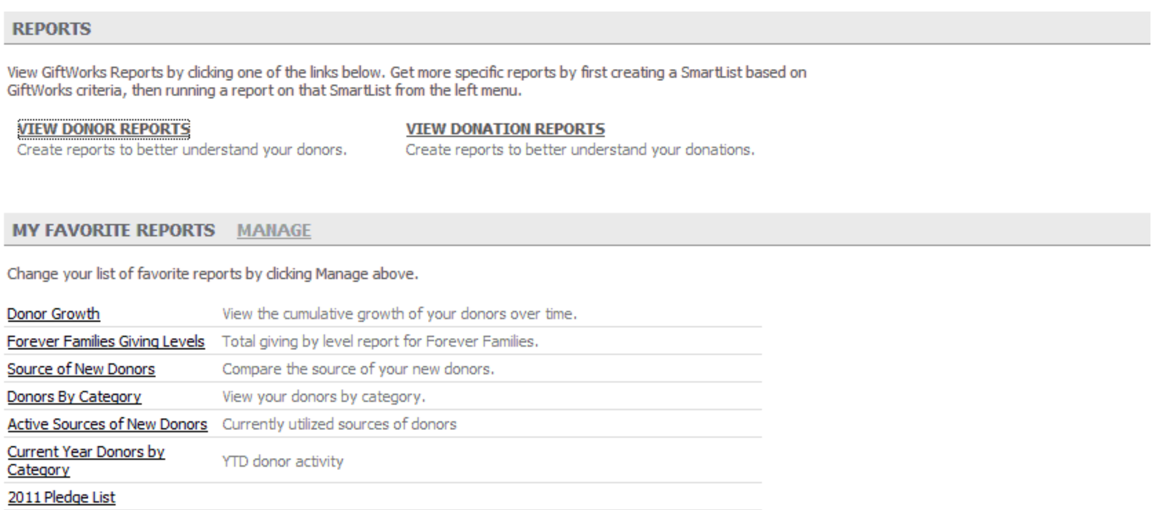
Click on the Save Report Design on left under Related Actions



Name your Report and enter a Description if you would like



When you click on Save it will add your saved report format to the MY FAVORITE REPORTS area on the main Reports screen.



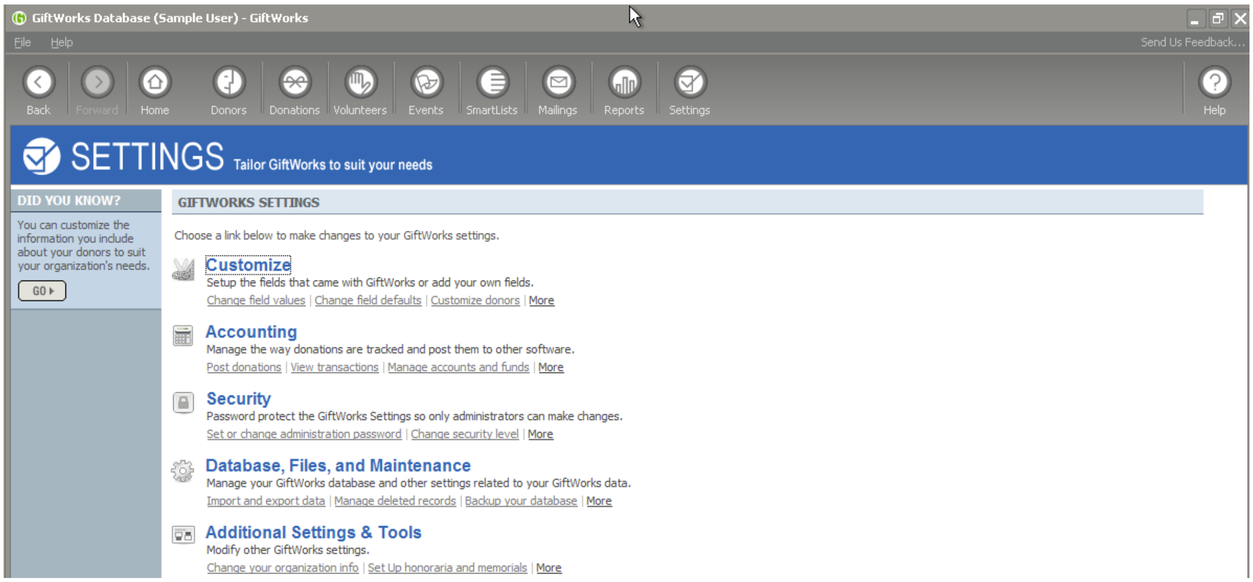
SETTINGS

IN THIS SECTION

Seasonal Address Update (Premium)
GiftWorks Checkup
Additional Settings & Tools
Change Your Organization Information
Manage Honoraria and Memorials
Manage SmartList Categories
Manage SmartEntry Pages
Run a SmartUpdate (Batch Updates)
Geocode Donnor Addresses
Find Duplicate Donors
Merge Donors

GIFTWORKS SETTINGS OVERVIEW

The Settings section of GiftWorks contains all administrative settings. Among other features, you can customize GiftWorks to meet your organization's specific needs, set up the accounting features of GiftWorks, administer the security settings, perform maintenance on your database and database file, and make batch updates to your database.

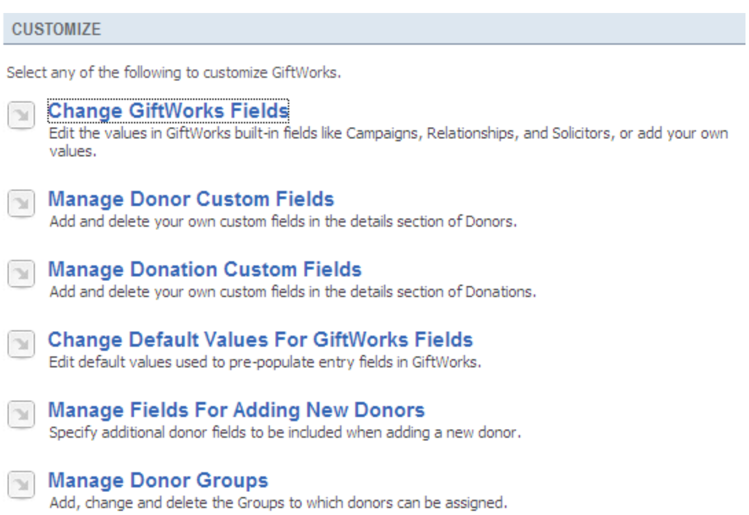


To get to the Settings section, click the **Settings** icon at the top of GiftWorks. From there, you click any of the headers to visit the subsections, or click any of the linked tasks to go directly to it.

The Settings section is divided into the five subsections, explained in detail below.

CUSTOMIZING GIFTWORKS

This subsection of Settings contains the main options for customizing GiftWorks to meet your needs. These options will help you ensure consistent data entry.



The Customizing GiftWorks subsection offers the options explained below.

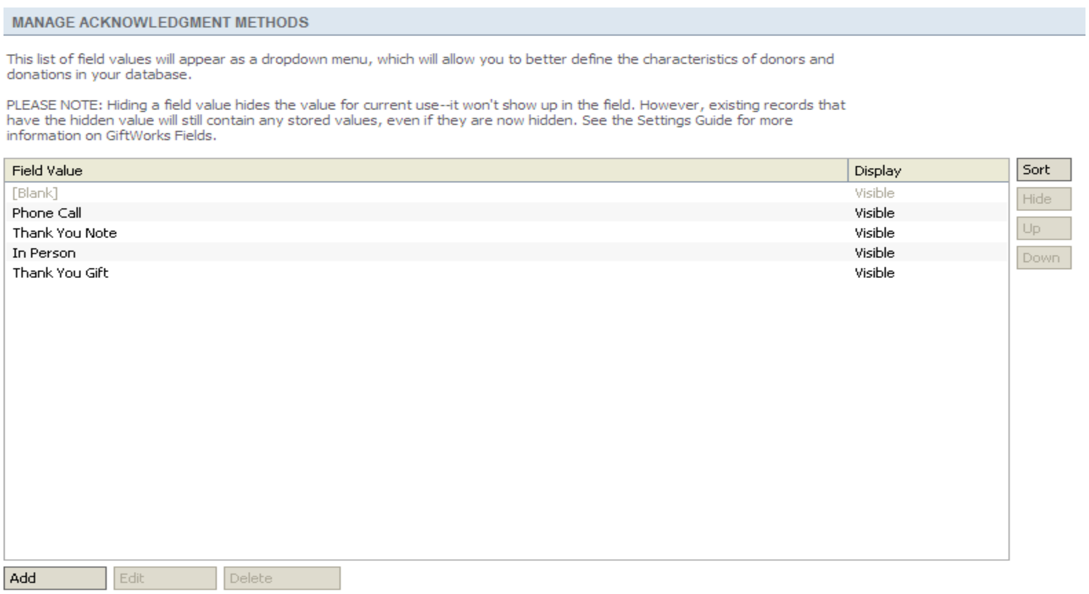
CHANGING GIFTWORKS FIELDS

Most of the drop-down lists that appear in GiftWorks donor, donation, and pledge records are customizable. You can modify these lists to meet your organization's needs. All the lists are pre-populated with values, but you can modify or delete these values (with some exceptions).

See below for more information on specific customizable fields.

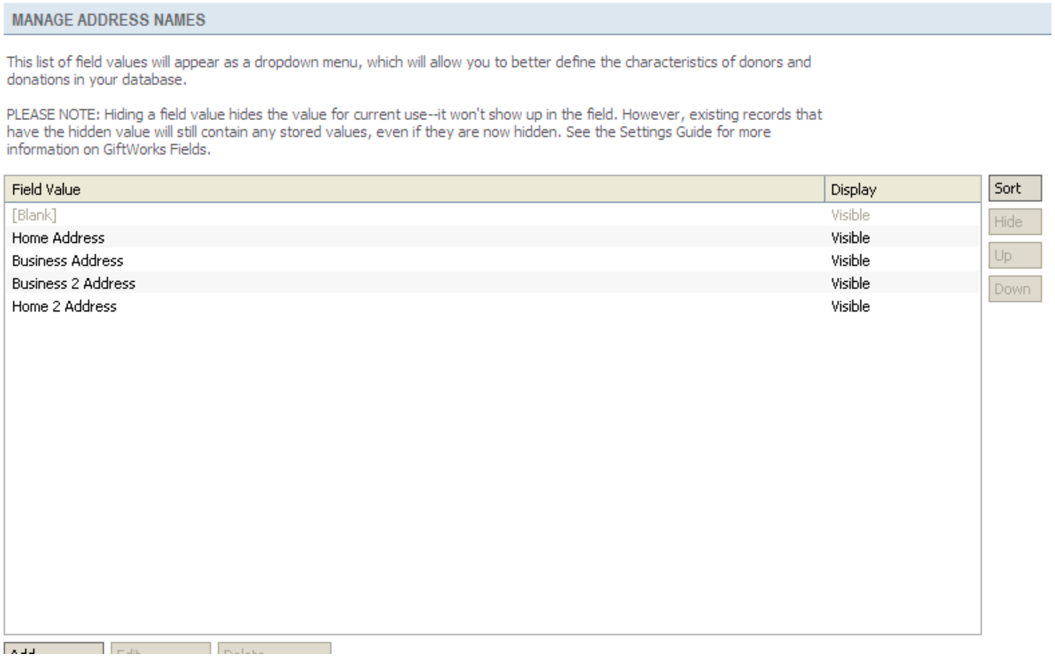
Acknowledgment Methods

Add your own types of Acknowledgment options (e.g. Phone Call, Thank You Note)



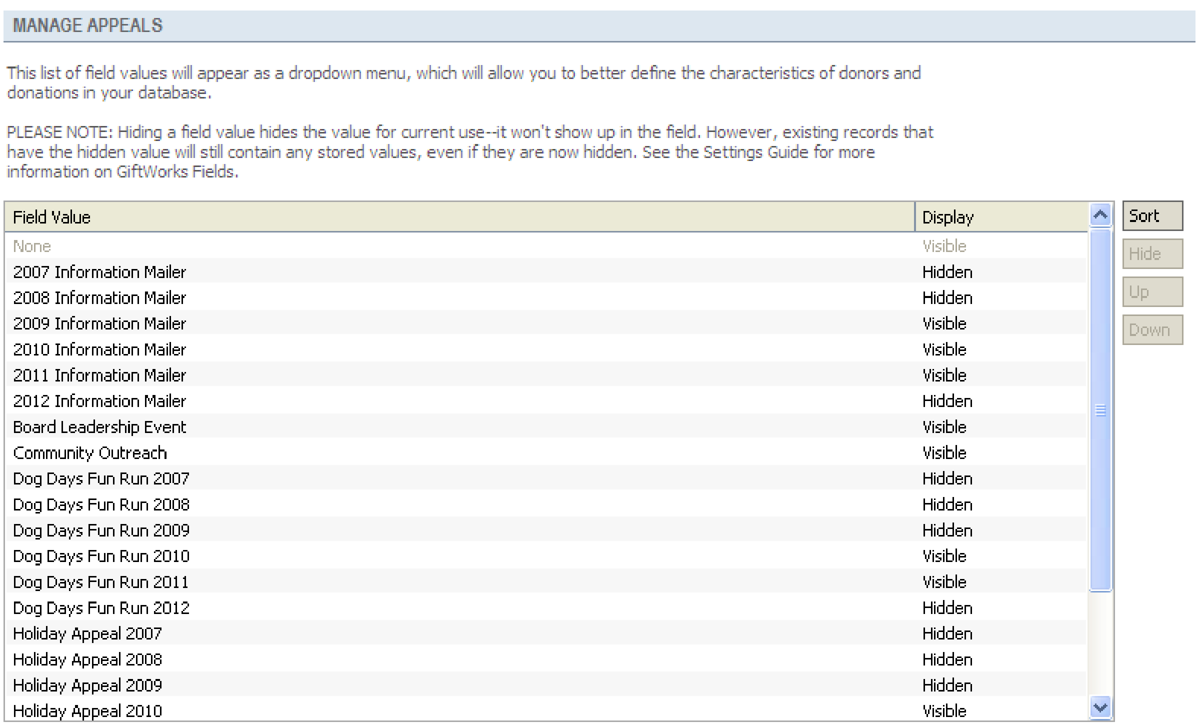
Address Names

Add your own Address Name options for your donor addresses (e.g. home Address, Business Address)



Appeals

An Appeal is a Fundrasing activity. Each solicitation your organization sends out or event it holds can be entered as a separate appeal in GiftWorks.



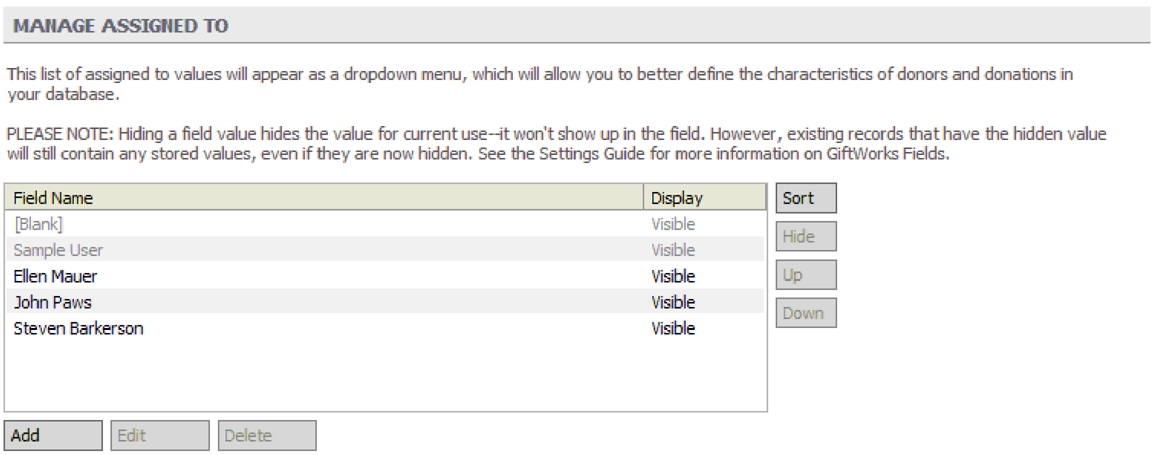
Each incoming donation should be attributed to the appeal it resulted from, letting you track the effectiveness of each fundraising tactic. For example, if you have a phonathon, dinner, and golf

tournament in support of your annual campaign, you can track each as separate appeals to see how many donation dollars each generates.

By using similar appeal information for recurring items (for example, Golf Tournament 2007, Golf Tournament 2008), you can compare the performance of appeals from year to year.

Assigned To

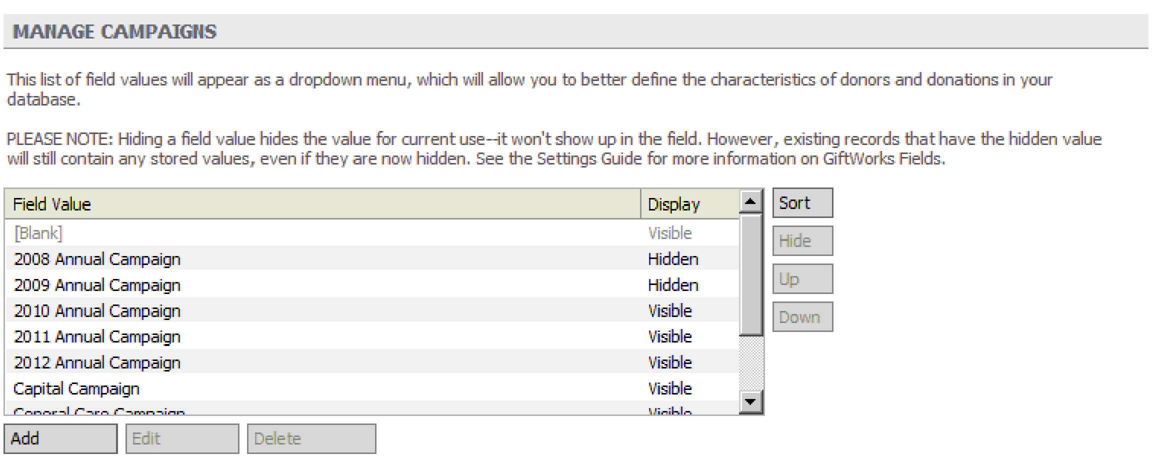
The Assigned To field is included in each donor record, and allows you to designate a person to whom the donor is assigned. This may be an employee or board member, for example. The Assigned To designation might be used for the person who is primarily responsible for contacting or soliciting a donor.



GiftWorks users within your organization are automatically included in the Assigned To list and cannot be removed. If you want, you can add other non-users to the Assigned To list.

Campaigns

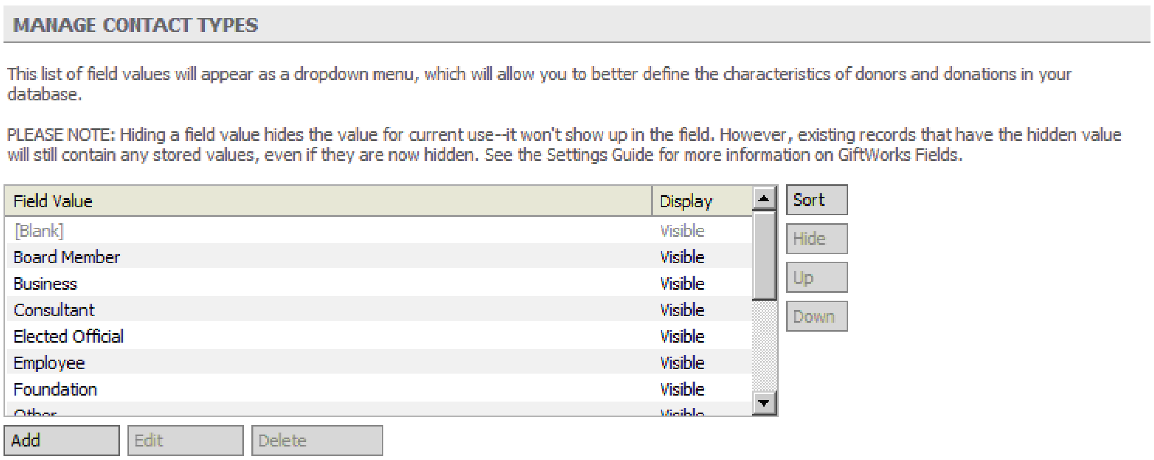
A campaign is a series of events and/or solicitations (each of which may be entered in GiftWorks as an appeal) that make up a cohesive push for donations, generally for a specific purpose.



The Campaign field is included in each gift and pledge record. Tracking donations by campaign allows you to monitor the progress of the campaign and to compare the effectiveness of recurring campaigns (such as successive annual campaigns).

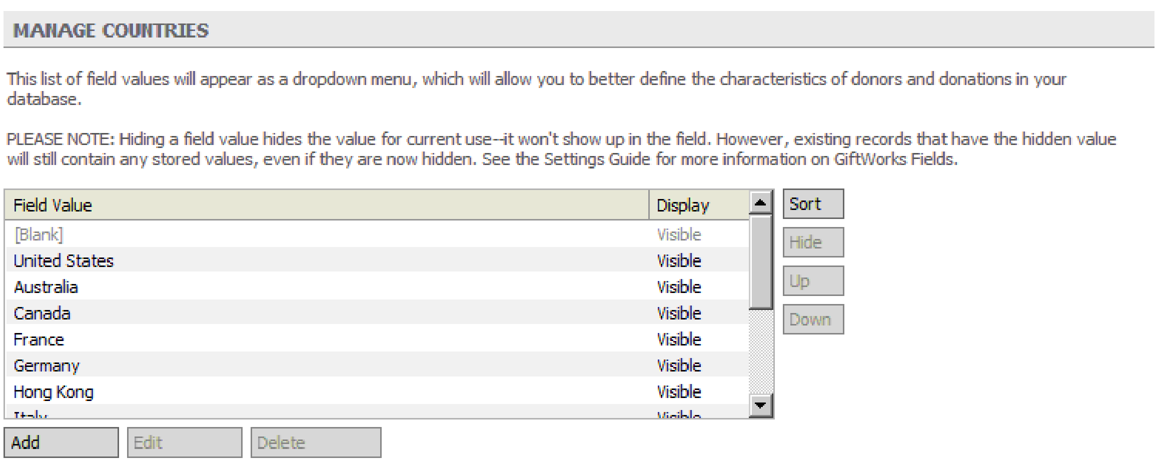
Contact Types

Contact Type is a field that appears in the Employment Details section of each donor record. It can be used to record the type of contact the donor is for their employer -- for instance if they are the billing contact.



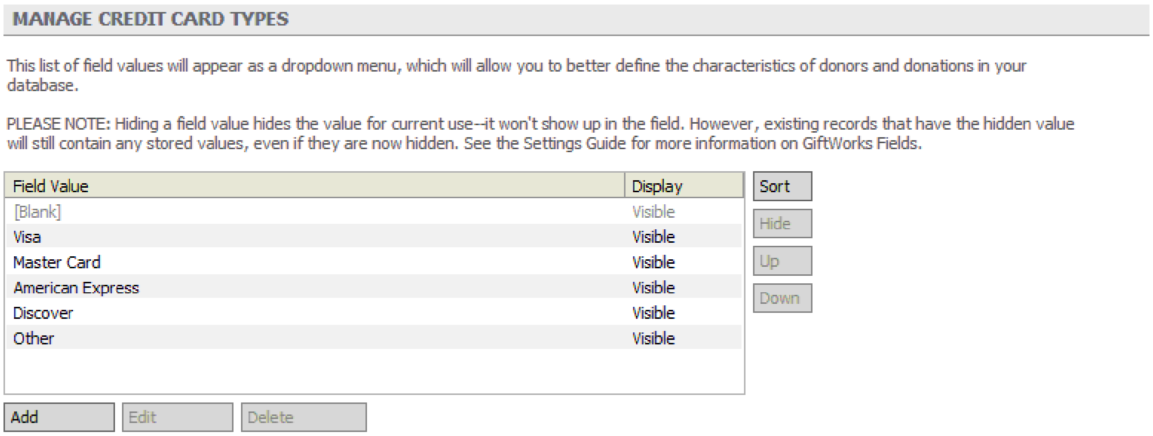
Countries

The list of countries that can be selected when entering donor addresses can be customized. You can add or remove countries to suit your needs. You can also change the order in which countries appear in the list to make data entry easier.



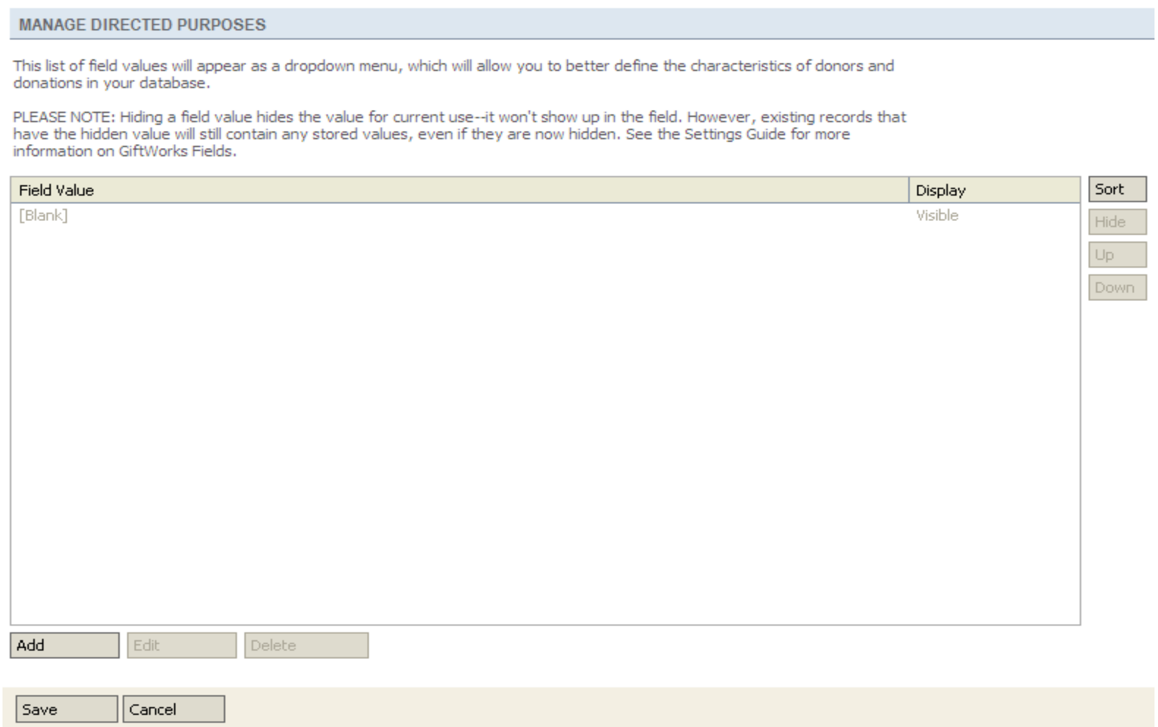
Credit Card Types

Credit Card types (e.g. Visa, Master Card



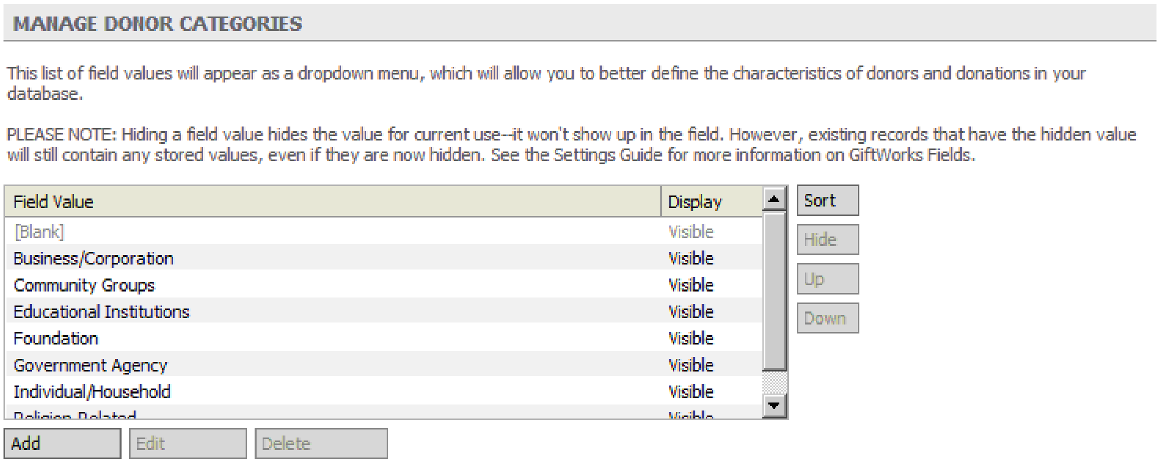
Directed Purposes

The purpose to which a donation is directed or restricted



Donor Categories

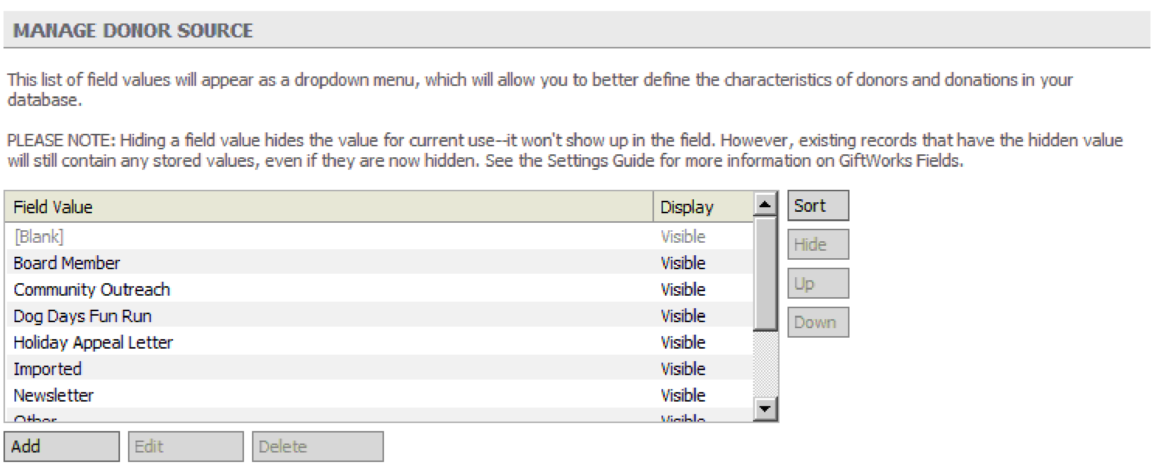
Donor Category is a field that appears in each donor record and can be used to categorize donors more granularly than donor profiles.



For example, in addition to designating organizations in your database with organization profiles, you can use Donor Category to indicate which are corporations, foundations, religious institutions or government agencies. The categories can be used to generate SmartLists and reports, letting you segment mailings or report on donation totals from different categories.

Donor Source

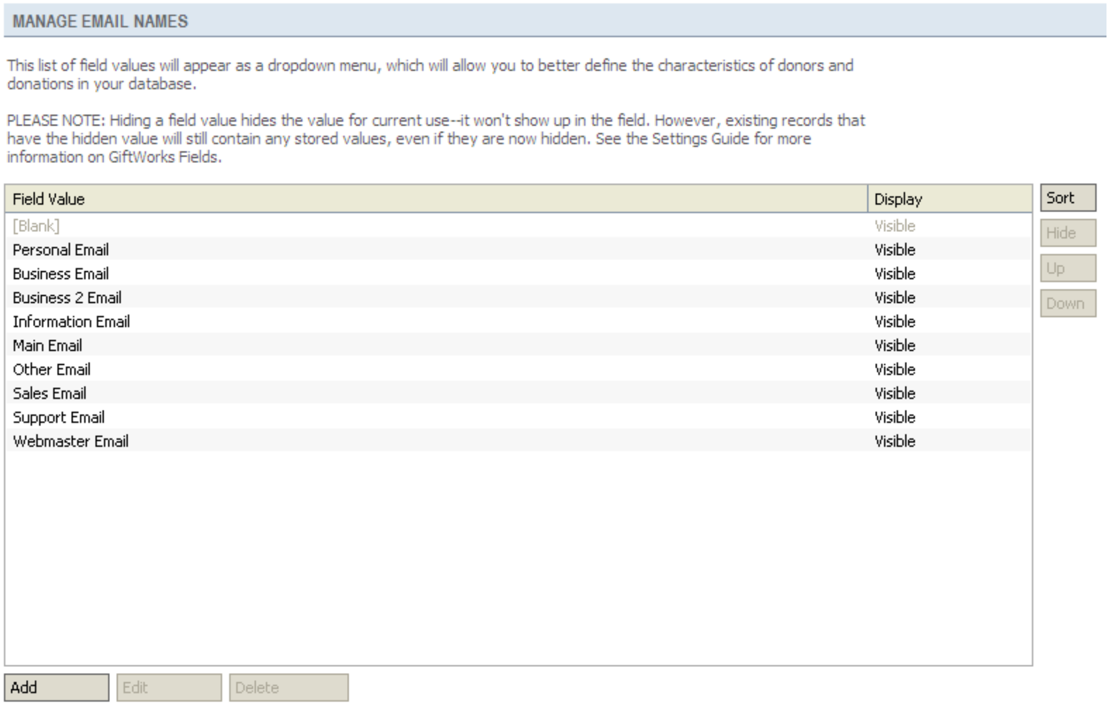
Donor Source is a field in each donor record that lets you track how each donor came to know about your organization. You can use this to track the effectiveness of your outreach or recruitment efforts.



For example, if you held a special informational event to introduce your organization to the community and handed out cards for people to fill out who want more information, you could enter a distinct "source" for that event and then track which new donors you entered as a result.

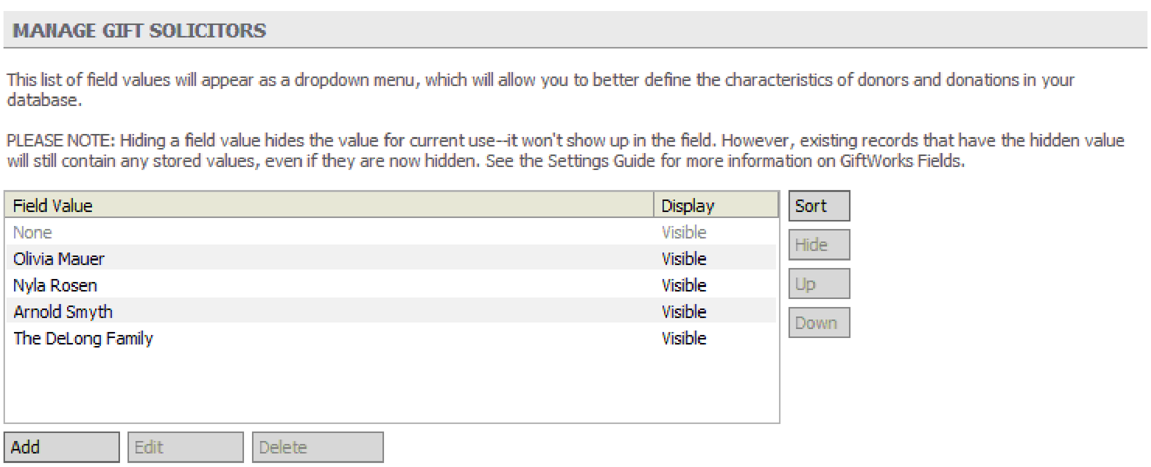
Email Names

Names for Donor Email addresses (e.g. Personal Email, Business Email)



Gift Solicitors

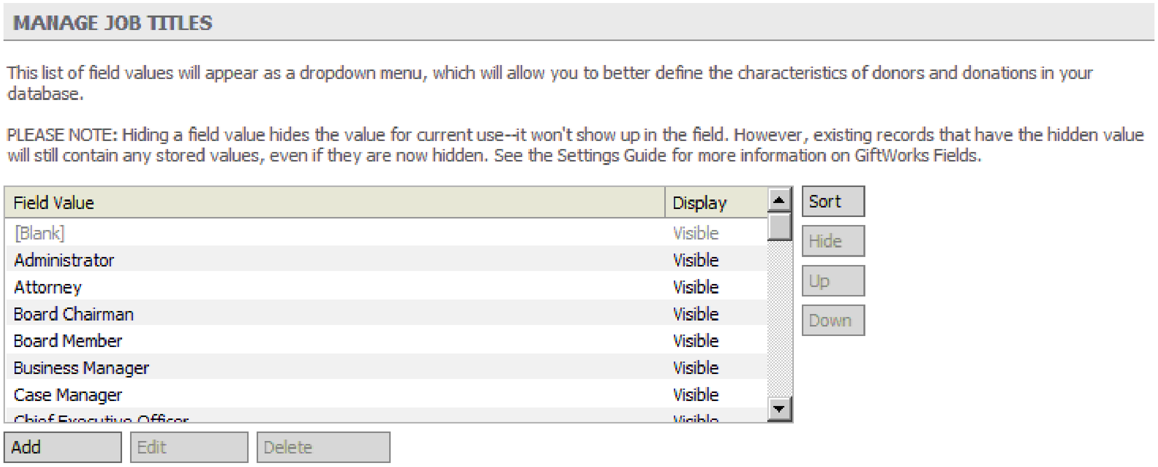
Solicitor is a field that appears in each gift or pledge record and allows you to track who, if anyone, was responsible for soliciting that donation.



You can use this field to track solicitation effectiveness of your board members, for example, if you assign them each specific donors to ask for donations.

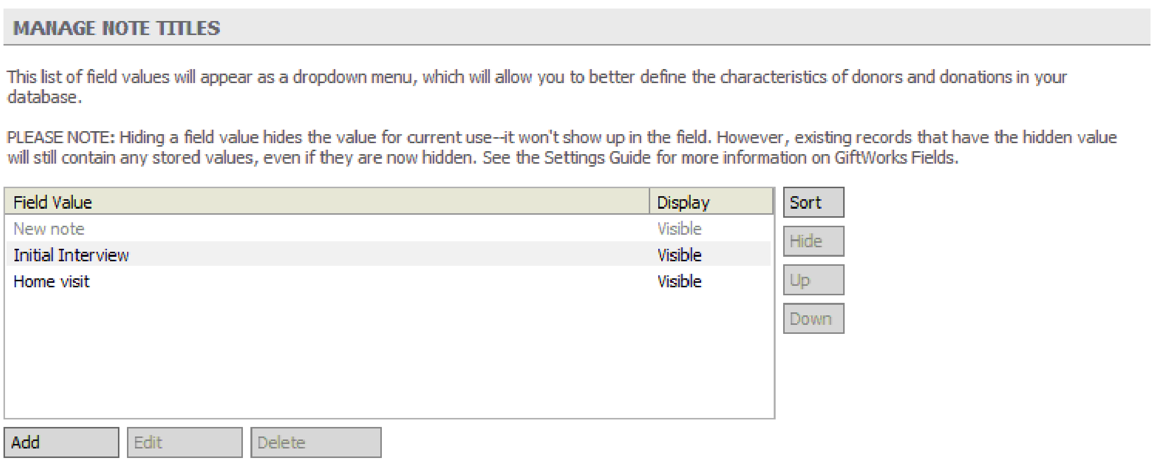
Job Titles

Job Title is a field that appears in each donor's record. The default list includes many values, but you can customize it if you need additional values. An example of how you might use this field is if you want to contact all attorneys in your database to inquire about pro bono services for your organization or a client.



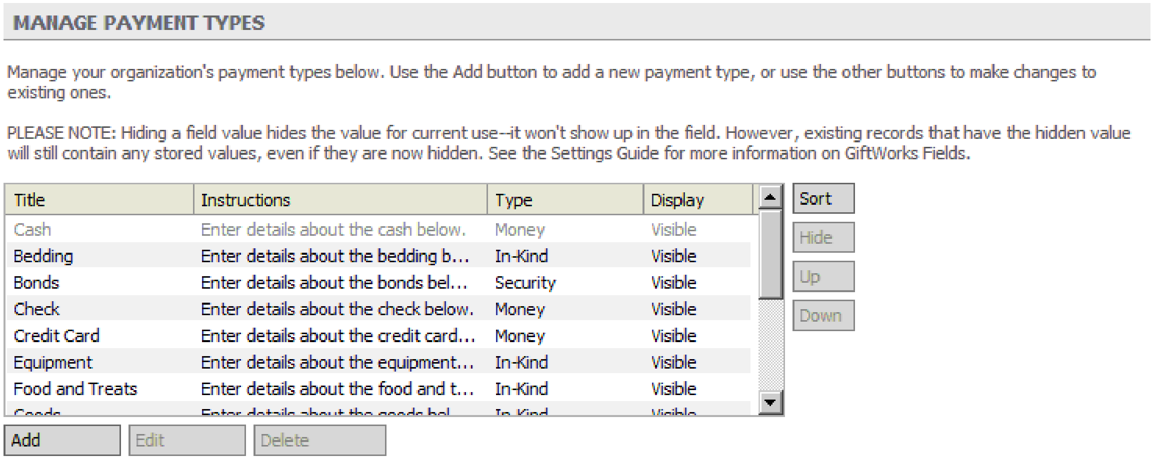
Note Titles

Titles for your Donor Notes



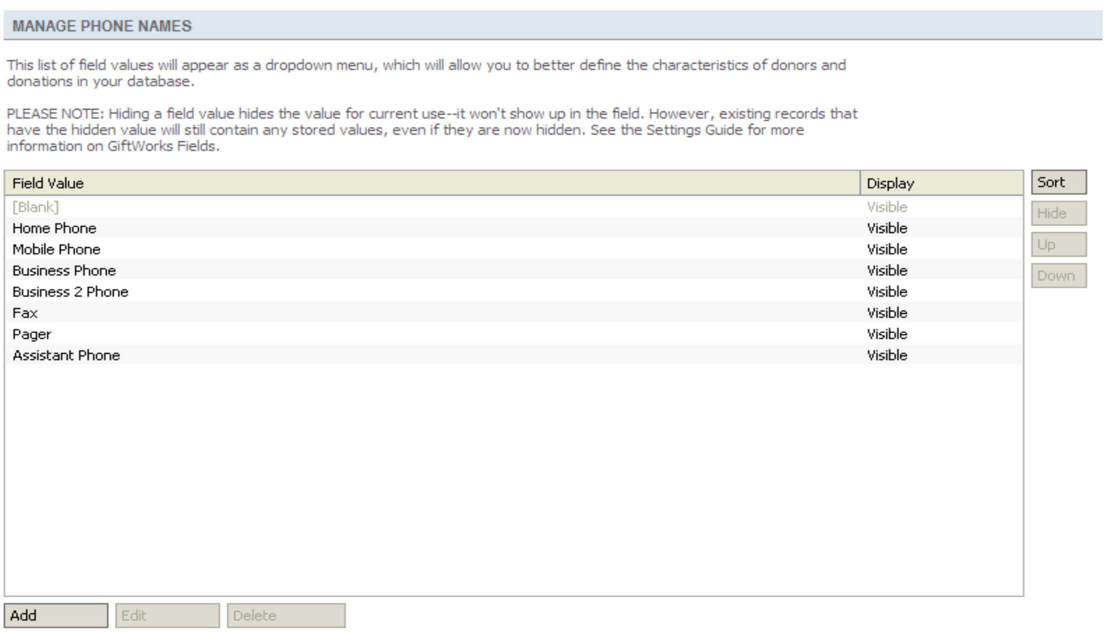
Payment Types

For each gift or pledge payment entered into GiftWorks, you will select a payment type. The default values include cash, check, credit card, and stocks.

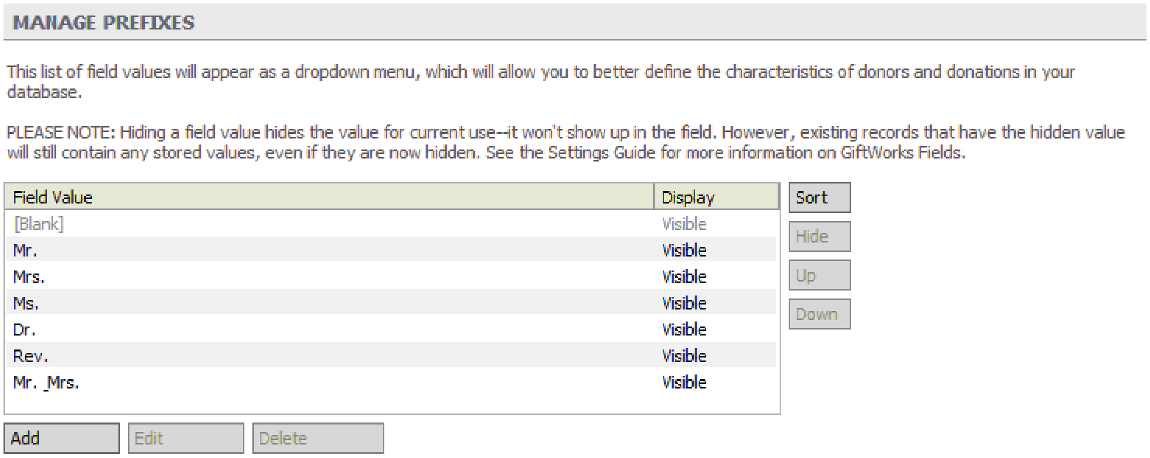


If your organization receives a donation type not included as a default value, you can add a custom payment type. When you add the payment type, you can provide instructions for users entering payments of that type into the system, as well as a name, description, and the types of data you want to record for that payment type.

Phone Names
Names for donor phone numbers (e.g. Home Phone, Mobile Phone)

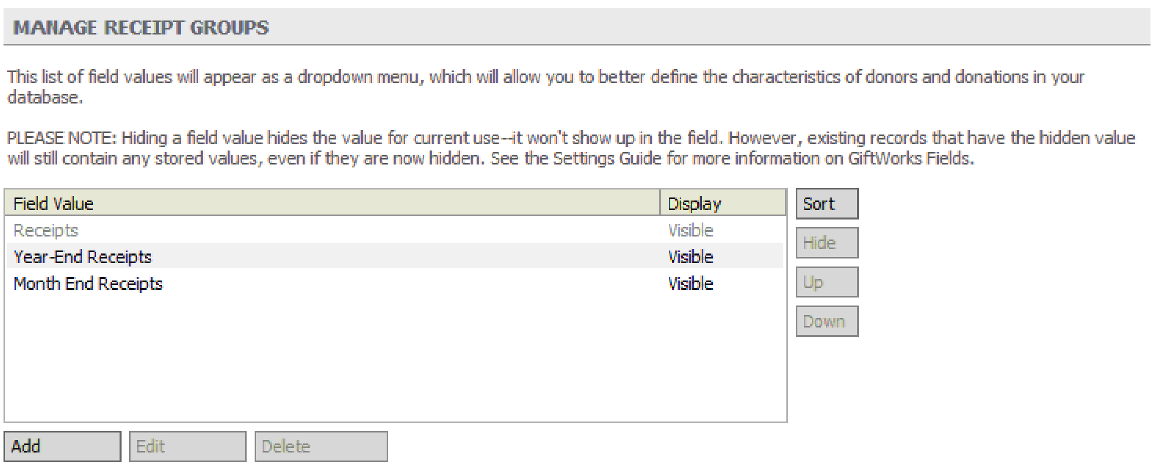


Prefixes
GiftWorks includes Mr., Mrs., Ms., and Dr. by default for donor prefixes. You can customize this list by adding additional prefixes. You can also change the order of the list so that the most commonly used values appear at the top.



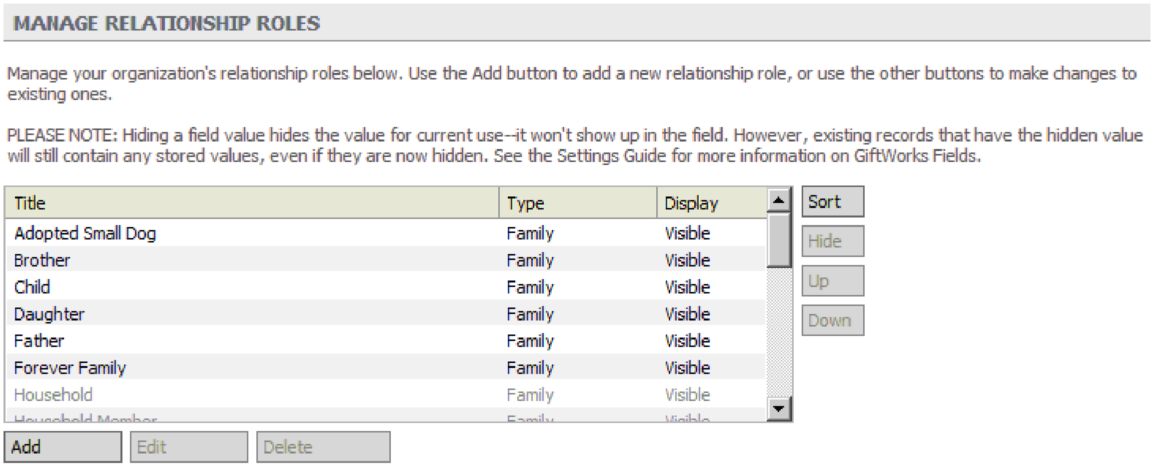
Receipt Groups

Create Receipt Groups to segment donations for specific receipt mailings.



Relationship Roles

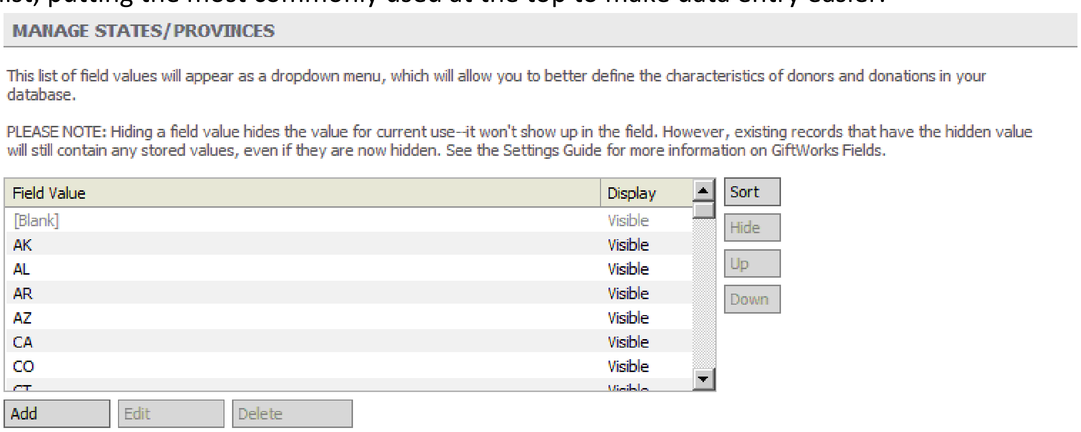
When you define a relationship between two donors, a two-way link is created between those donors, and you need to designate a role for each of the donors in that relationship. For example husband and wife, brother and sister, partners, or parent and child.



You can customize the default list of roles if your organization has needs in addition to those included with GiftWorks.

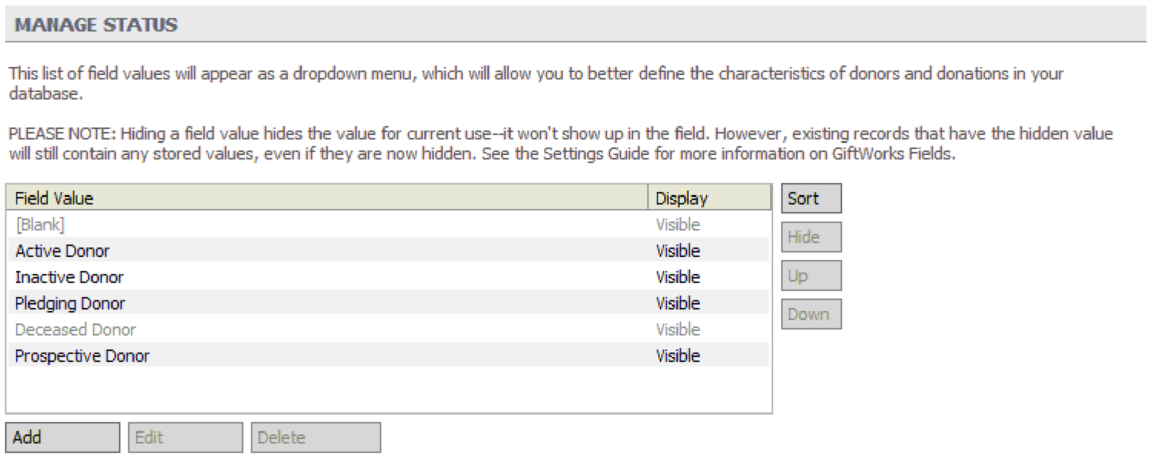
States/Provinces

The list of states/provinces that can be selected when entering donor addresses can be customized. You can add or remove states to suit your needs. You can also change the order in which states appear in the list, putting the most commonly used at the top to make data entry easier.



Status

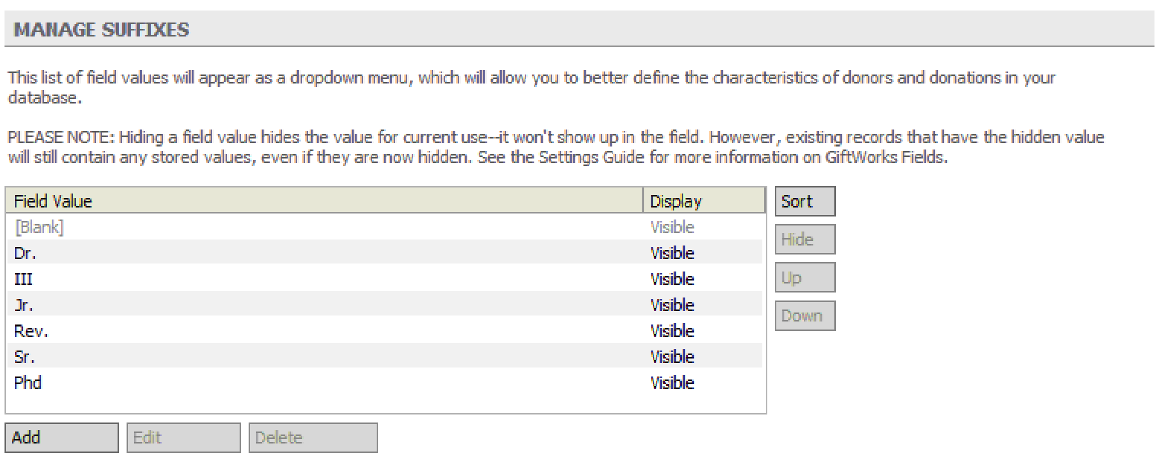
Each donor record has a Status field that can be used to record the donor's current status with regards to your organization.



Default values include active donor, inactive donor, customer, and Deceased. You can use the values in this field to create SmartLists and reports, allowing you, for example, to target solicitations at specific statuses of donor.

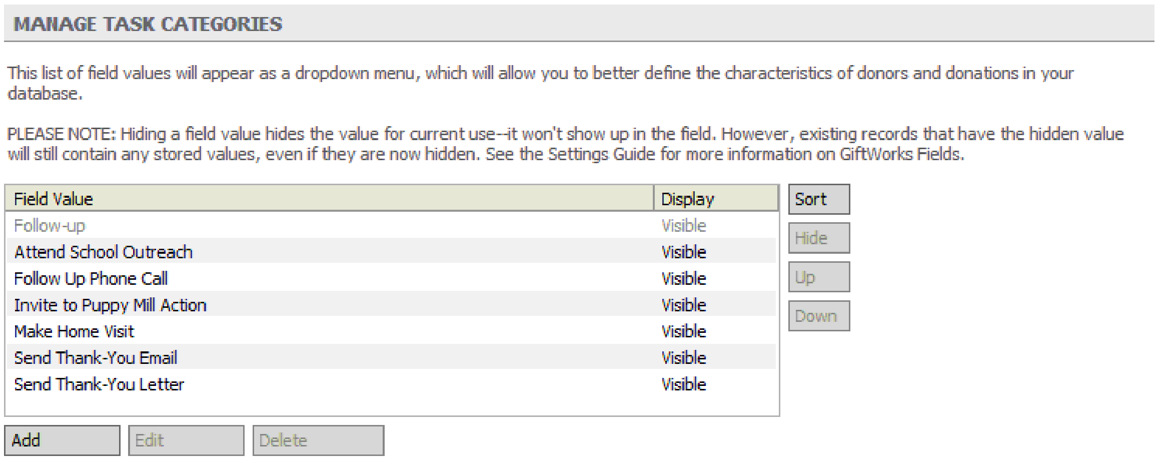
Suffixes

Donor suffixes (eg. Jr., Sr.)



Task Categories

The category for adding tasks for donors


MANAGE TASK CATEGORIES
This list of field values will appear as a dropdown menu, which will allow you to better define the characteristics of donors and donations in your database.
PLEASE NOTE: Hiding a field value hides the value for current use--it won't show up in the field. However, existing records that have the hidden value will still contain any stored values, even if they are now hidden. See the Settings Guide for more information on GiftWorks Fields.
Field Value
Display
Follow-up
Visible
Attend School Outreach
Visible
Follow Up Phone Call
Visible
Invite to Puppy Mill Action
Visible
Make Home Visit
Visible
Send Thank-You Email
Visible
Send Thank-You Letter
Visible
Sort
Hide
Up
Down
Add
Edit
Delete

MANAGING DONOR / DONATION CUSTOM FIELDS

Each GiftWorks donor record includes over 40 fields for recording information about that donor. Often, however, organizations want to track other information about their donors. To address this need, GiftWorks includes the ability to add custom fields to both donor and donation records.

STANDARD

You can add up to 26 custom fields each to donor and donation records, choosing from up to five types of custom fields:

List Dropdown: A fixed but customizable list of values that a user can select from a dropdown menu. You can have up to six fields of this type for donor and donation records.

Dates: A date field that includes a popup calendar for choosing a date when a user is entering data. You can have up to two fields of this type for donor and donation records.

Numbers: Allows users to store numeric values which can be sorted in Reports and SmartLists based on numeric values (not text)

Currency: Allows users to store currency values which can be sorted in Reports and SmartLists based on currency values (not text)

Other:

Textbox: A simple box where a user can enter any textual or numeric data.
Textbox dropdown: a combination of textbox and list dropdown. You can enter a list of values that the user can choose from, but the user can also enter any textual or numeric data.
Checkbox: A box that the user can click to check or uncheck.

PREMIUM

You can add up to 75 custom fields each to donor and donation records, choosing from up to five types of custom fields:

List Dropdown: A fixed but customizable list of values that a user can select from a dropdown menu. You can have up to 20 fields of this type for donor and donation records.

Dates: A date field that includes a popup calendar for choosing a date when a user is entering data. You can have up to 10 fields of this type for donor and donation records.

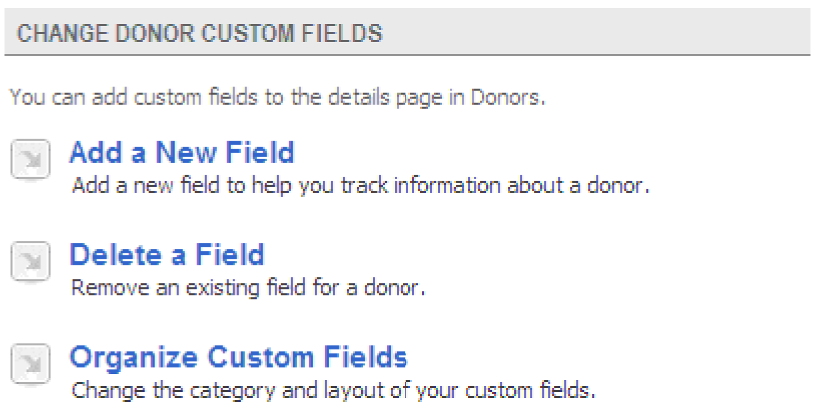
Numbers: Allows users to store numeric values which can be sorted in Reports and SmartLists based on numeric values (not text)

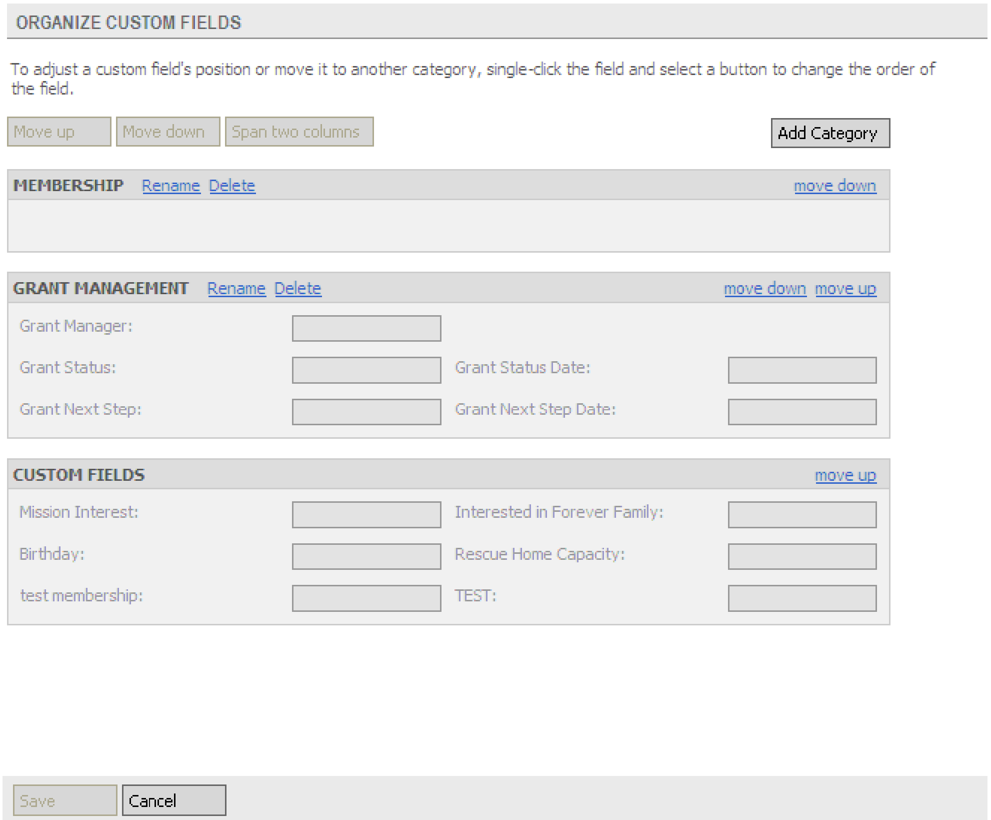
Currency: Allows users to store currency values which can be sorted in Reports and SmartLists based on currency values (not text)

Other:

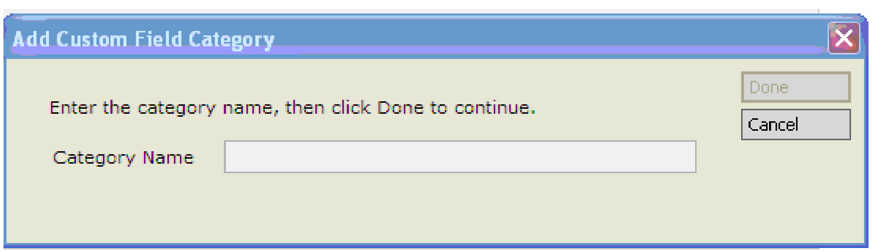
Textbox: A simple box where a user can enter any textual or numeric data.
Textbox dropdown: a combination of textbox and list dropdown. You can enter a list of values that the user can choose from, but the user can also enter any textual or numeric data.
Checkbox: A box that the user can click to check or uncheck.

You can now Organize your Custom Fields . You can change the category and layout for how the fields appear within donors and donations.



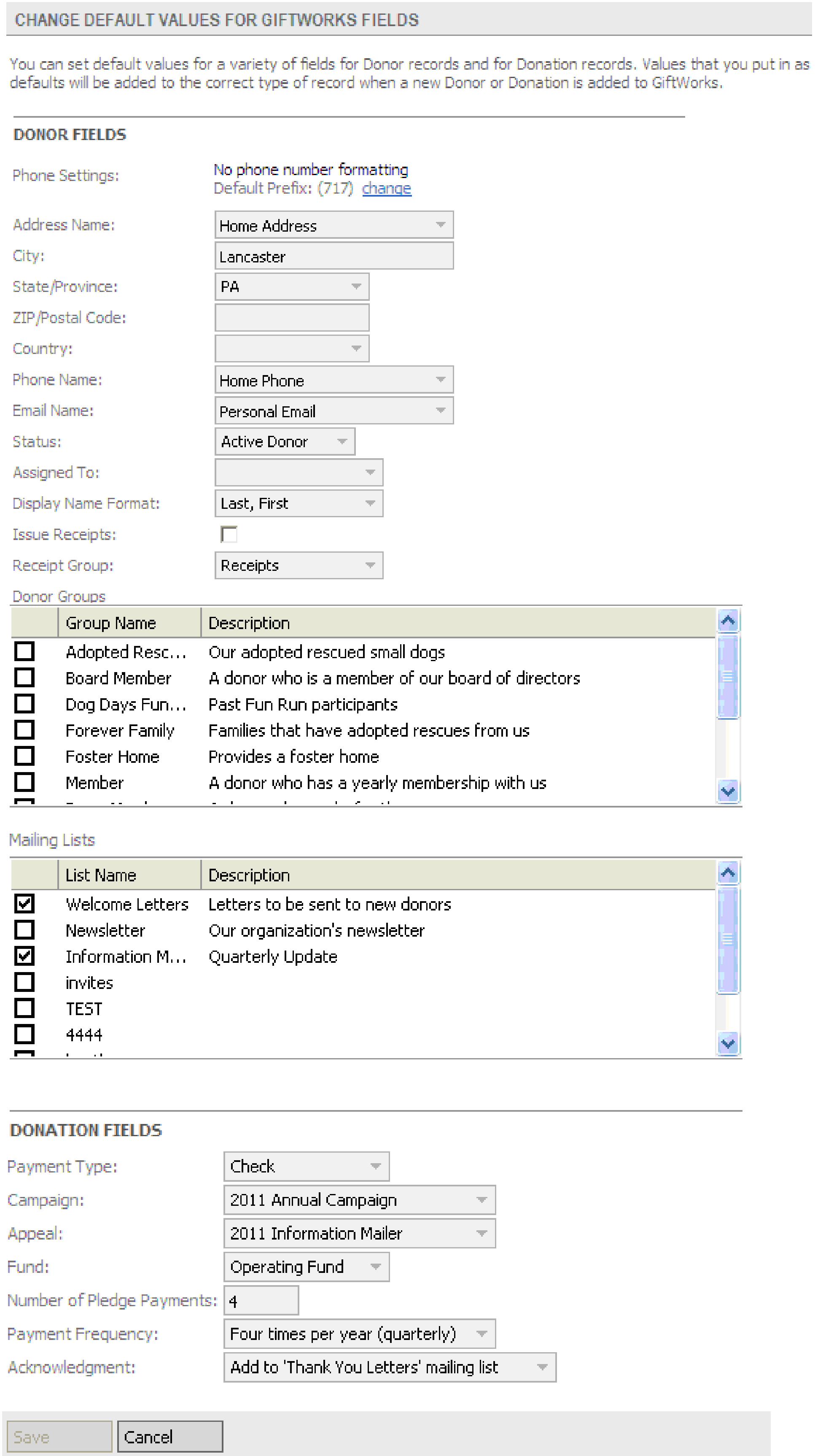


Click on Add Category button to create your own Categories.



CHANGING DEFAULT VALUES FOR GIFTWORKS FIELDS

You can set default values for a variety of donor and donation fields in GiftWorks. These values automatically appear for each newly added donor or donation, and can save time and encourage consistency in data entry. Changing default values will not affect existing records in your database, only new entries.



CHANGE DEFAULT VALUES FOR GIFTWORKS FIELDS

You can set default values for a variety of fields for Donor records and for Donation records. Values that you put in as defaults will be added to the correct type of record when a new Donor or Donation is added to GiftWorks.

DONOR FIELDS

Phone Settings: No phone number formatting
Default Prefix: (717) change

Address Name: Home Address
City: Lancaster
State/Province: PA
ZIP/Postal Code:
Country:
Phone Name: Home Phone
Email Name: Personal Email
Status: Active Donor
Assigned To:
Display Name Format: Last, First
Issue Receipts: ☐
Receipt Group: Receipts

Donor Groups

	Group Name	Description
☐	Adopted Resc...	Our adopted rescued small dogs
☐	Board Member	A donor who is a member of our board of directors
☐	Dog Days Fun...	Past Fun Run participants
☐	Forever Family	Families that have adopted rescues from us
☐	Foster Home	Provides a foster home
☐	Member	A donor who has a yearly membership with us

Mailing Lists

	List Name	Description
☑	Welcome Letters	Letters to be sent to new donors
☐	Newsletter	Our organization's newsletter
☑	Information M...	Quarterly Update
☐	invites	
☐	TEST	
☐	4444	

DONATION FIELDS

Payment Type: Check
Campaign: 2011 Annual Campaign
Appeal: 2011 Information Mailer
Fund: Operating Fund
Number of Pledge Payments: 4
Payment Frequency: Four times per year (quarterly)
Acknowledgment: Add to 'Thank You Letters' mailing list

Save Cancel

The donor fields you can set defaults for are:

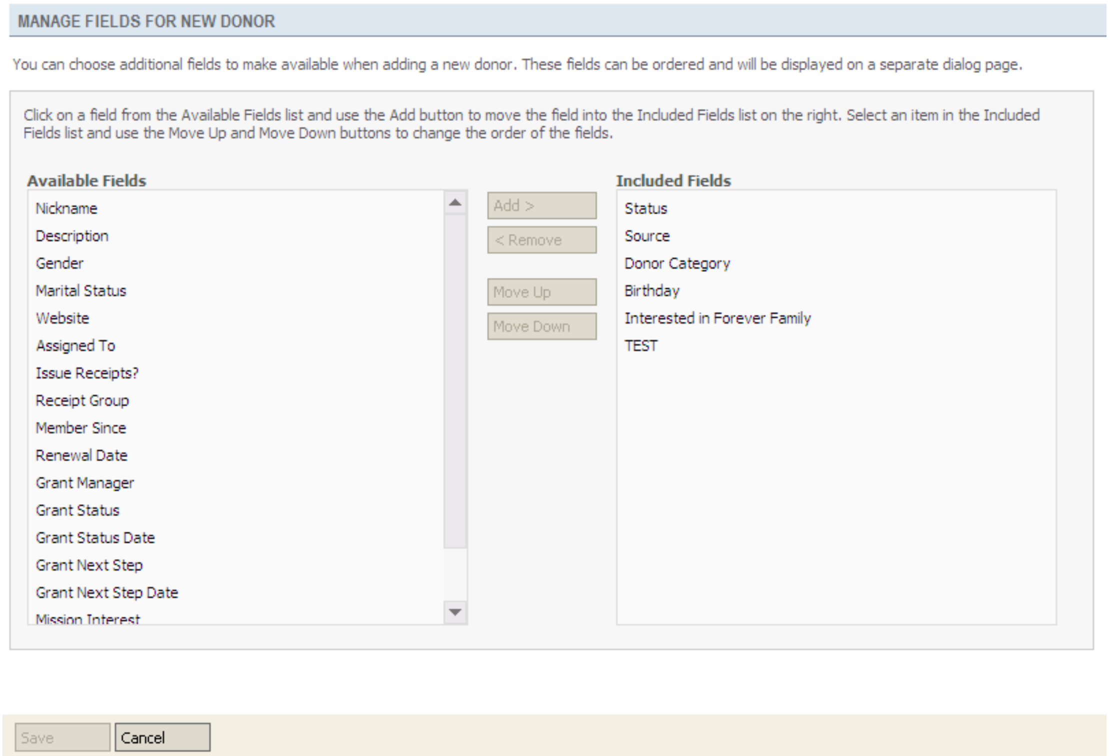
- Phone Settings
- Address Name
- City
- State/Province
- ZIP/Postal Code
- Country
- Phone Name
- Email Name
- Status
- Assigned To
- Display Name Format
- Issue Receipts
- Receipt Group
- Donor Groups
- Mailing Lists

The donation fields you can set defaults for are:

- Payment Type
- Campaign
- Appeal
- Fund
- Number of Pledge Payments
- Payment Frequency
- Acknowledgement

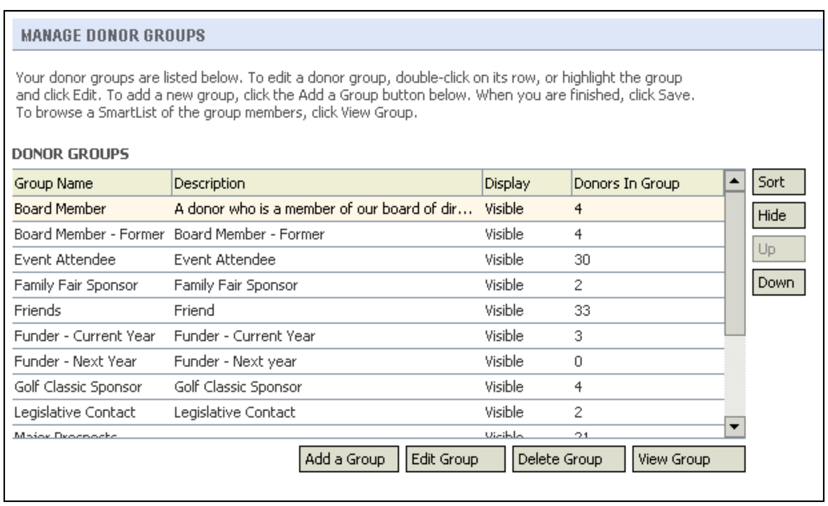
MANAGE FIELDS FOR ADDING NEW DONORS

You can choose additional fields to make available when adding a new donor. These fields can be ordered and will be displayed on a separate dialog page.



MANAGING DONOR GROUPS

Donor Groups are fields that appear in each donor record, but they differ from other donor fields in that you can select any number of groups for each donor.

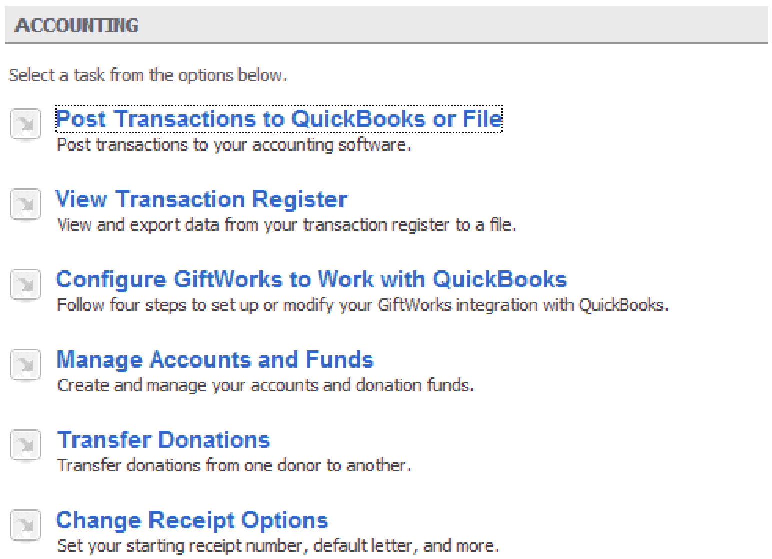


Each donor can be in as many or as few groups as you need. This gives you an easy way to designate groups of donors like board members, golf tournament sponsors, or Members.

You can browse each group directly by clicking the **View Group** button on the **Manage Donor Groups** screen, or use group values to create SmartLists, which can then be used for Mailings, reports, and in other ways throughout GiftWorks.

ACCOUNTING

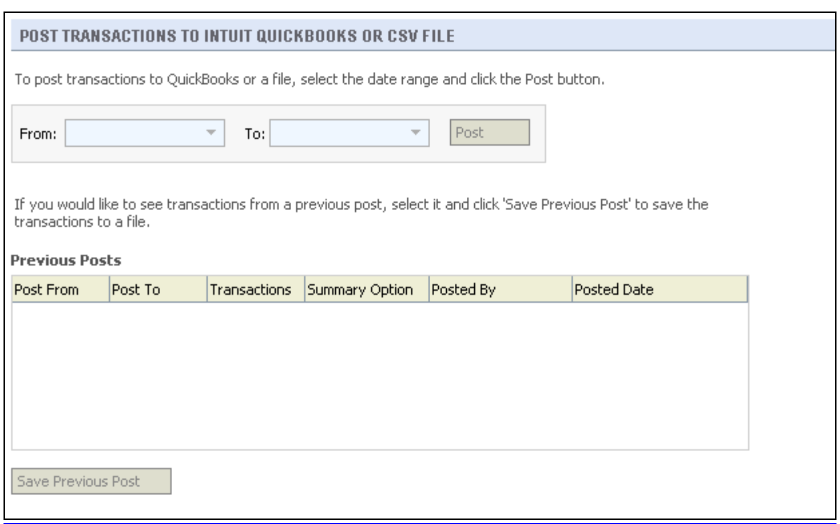
The Accounting subsection of the Settings section contains the main options for customizing GiftWorks for your organization's accounting needs.



The Accounting subsection has the options explained below.

Posting Transactions to QuickBooks or File

Periodically, you will want to post your accounting transactions, either to a file or printout for your accountant, or directly to QuickBooks or other accounting software.

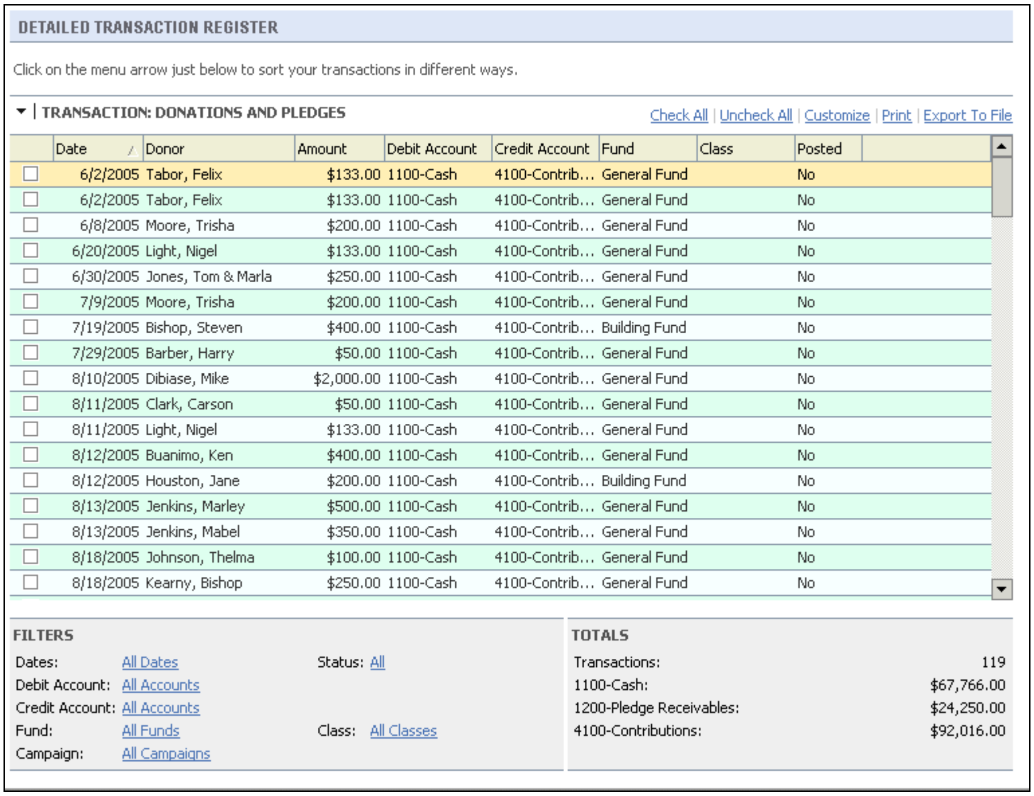


Transactions can be posted only once. Once posted, are no longer available for posting. You can print or re-export previous posts to view the transactions that were posted. During posting, you must choose some accounting options, including whether to post on a cash or accrual basis, and whether to post all details for the transactions or just a summary of the transactions.

You will also choose whether to post to a file or directly to QuickBooks. If you plan to integrate with QuickBooks, please refer to Configuring GiftWorks to Work with QuickBooks for instructions.

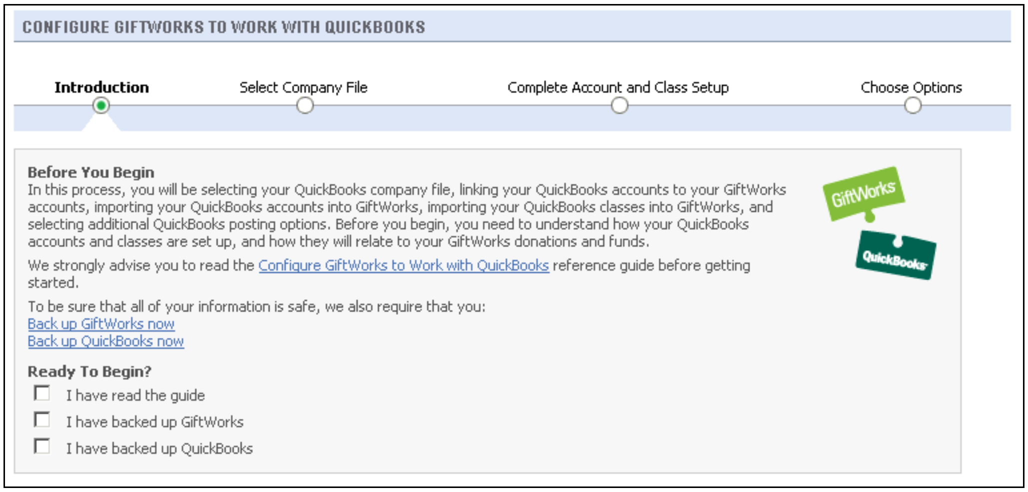
View Transaction Register

To view transactions that GiftWorks has stored for your donations, go to Settings, then click **Accounting**, then **View Transaction Register**.



GiftWorks maintains a detailed history of all accounting transactions generated by the donations you enter, as well as any changes or deletions you make to those donations. You can filter and customize the data display. You can also print or export the data.

Configure GiftWorks to Work with QuickBooks

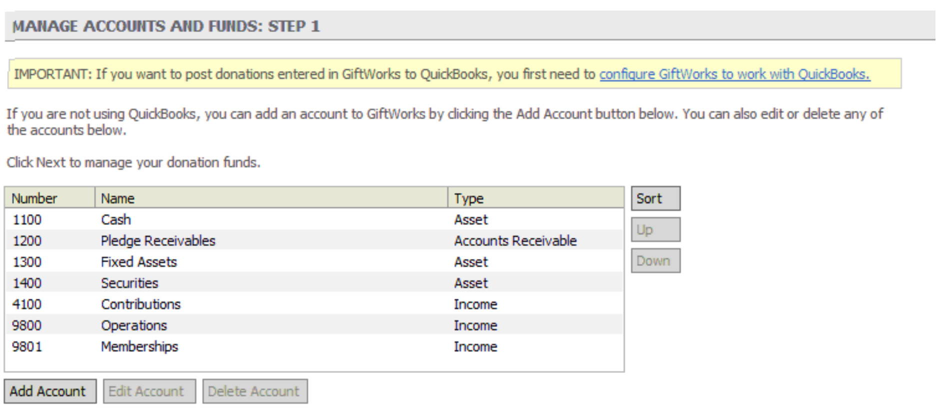


See the guide Configuring GiftWorks to Work with QuickBooks.

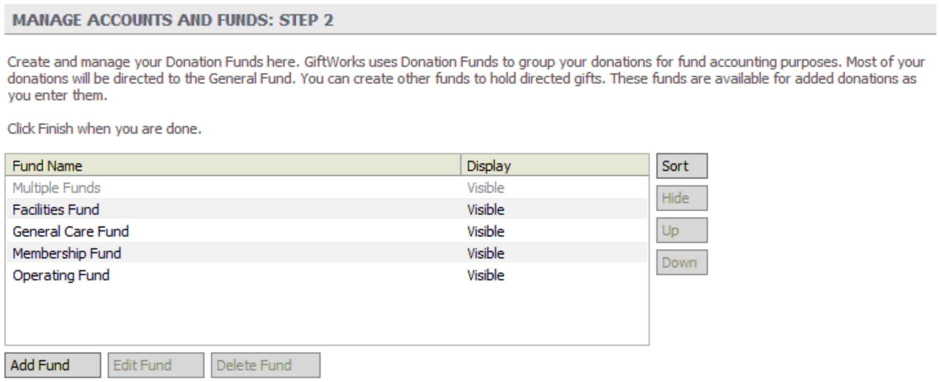
Manage Accounts and Funds

Each donation entered into GiftWorks is applied to a fund. GiftWorks funds are set up to point to specific accounts for each payment type. Since the way you set up these fields affects your transaction posts for your accountant or to your accounting software, you may want to consult with your accounting professional when setting them up.

Step 1: Accounts - If you configure GiftWorks to work with QuickBooks, that process will handle the setup of accounts. If you are not configuring to QuickBooks you will not use this area.

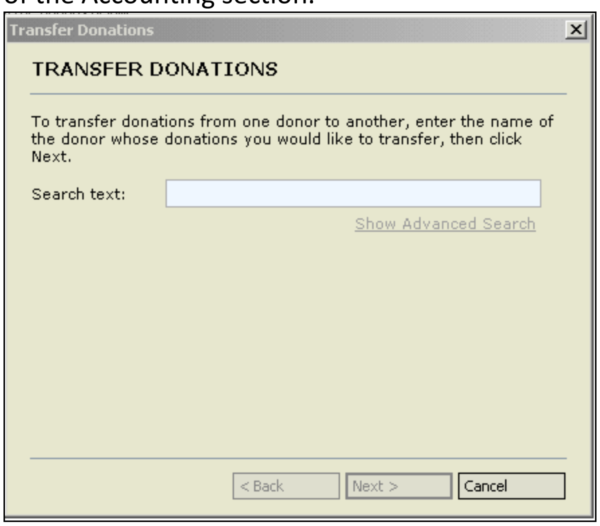


Step 2: Funds – You can add or edit Funds here. You can only delete a Fund if it has not been used. If you configure to QuickBooks, be sure to pick the accounts you need to post to when setting up the Fund(s).

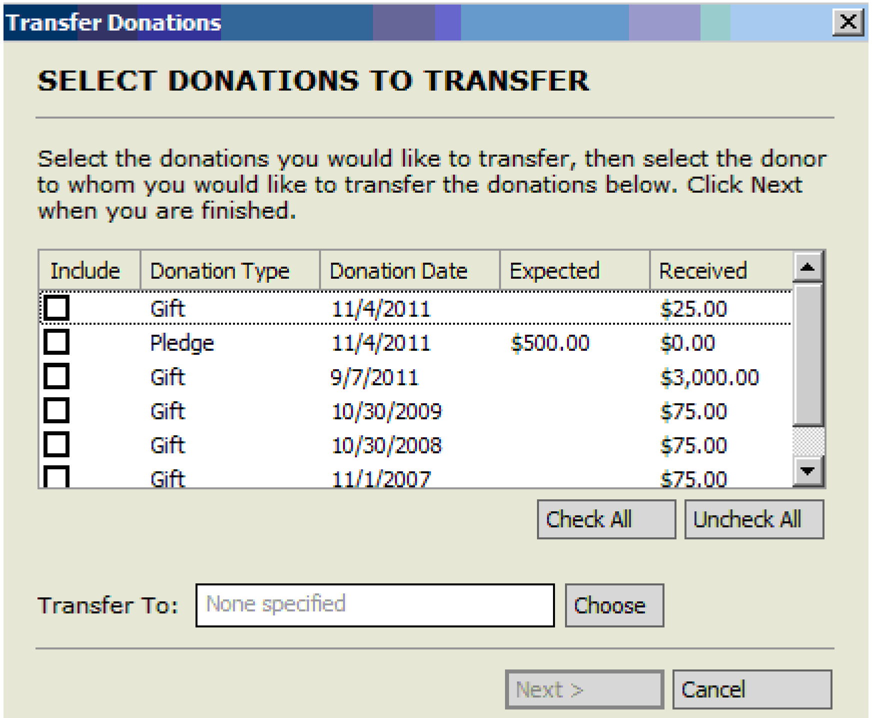


Transfer Donations

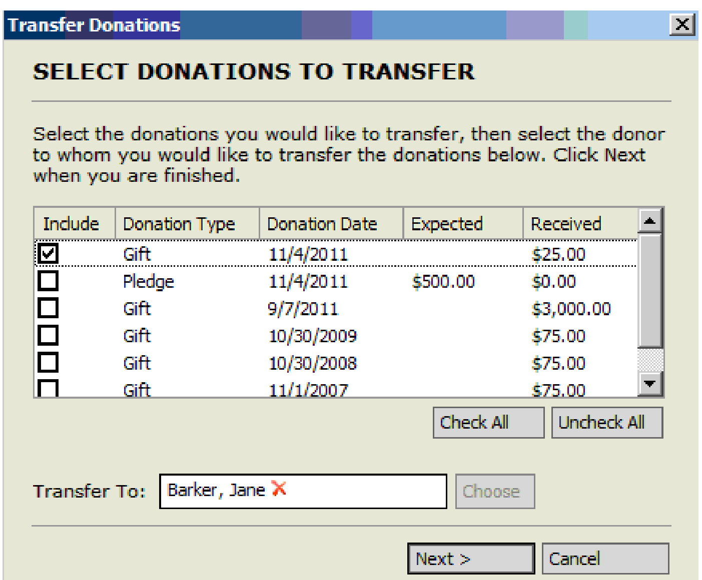
To transfer some or all of a donor's donations to another donor (to correct a data entry error, or if you have duplicate records for a donor, for example), you can do so from the Transfer Donation subsection of the Accounting section.



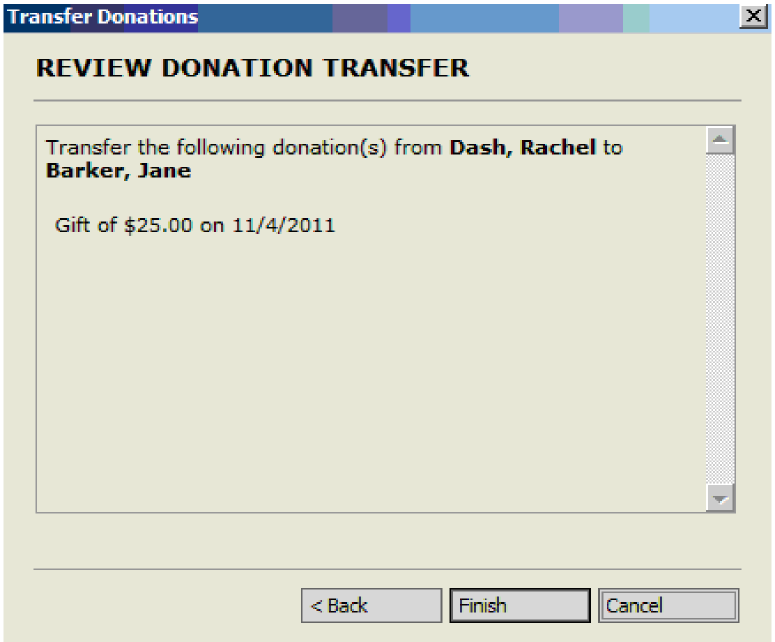
First search to find the donor you want to transfer from. You will then see the following dialog



Choose the donations, and choose the donor you want to transfer to and click Next



You will have a chance to review the donation transfer. Press Finish



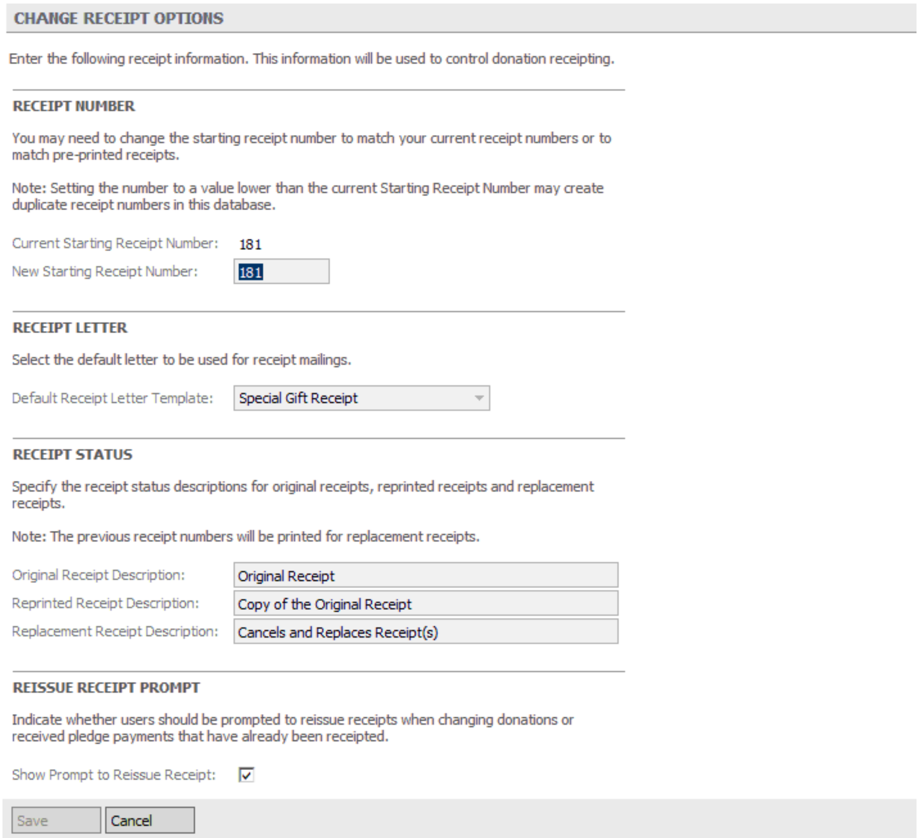
GiftWorks takes care of moving the donations from one record to the other, and adjusts the transaction register accordingly.

Change Receipt Options

Receipt Number
By default, GiftWorks starts with receipt number 1 and increases the receipt number by one for each system-generated receipt.

If you have an existing receipt numbering system (from a previous fundraising software or other system), you can change the GiftWorks starting receipt number to match your previous system.

Note that if you reset the receipt number to a lower number than the last receipt number generated by GiftWorks, you may end up with duplicate receipt numbers.



Receipt Letter
You can choose a default Receipt letter template

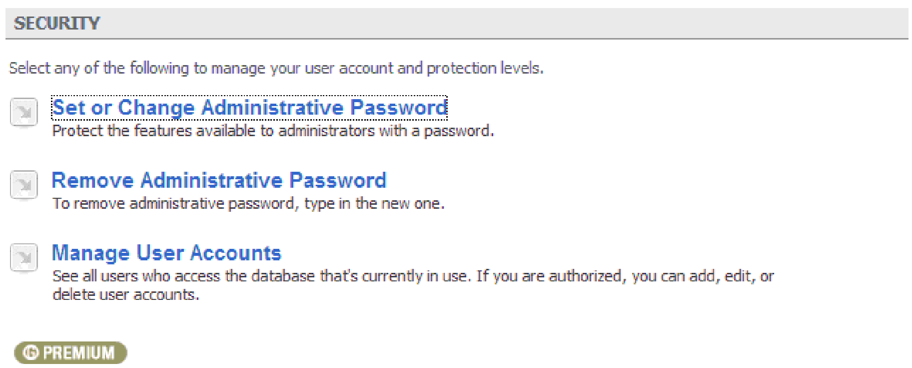
Receipt Status
You can specify the wording for these specific fields when using the “Receipt Status Description Field” in your Receipt letters.

Reissue Receipt Prompt
You can indicate whether users should be prompted to reissue receipts for edited donations and pledge payments that were already receipted.

SETTING SECURITY OPTIONS

FOR STANDARD USERS

The Security subsection of the Settings section contains the options for limiting access to certain areas of GiftWorks.

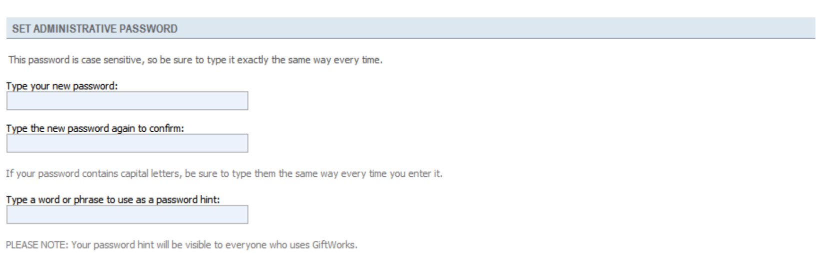


The Security subsection has the following options:

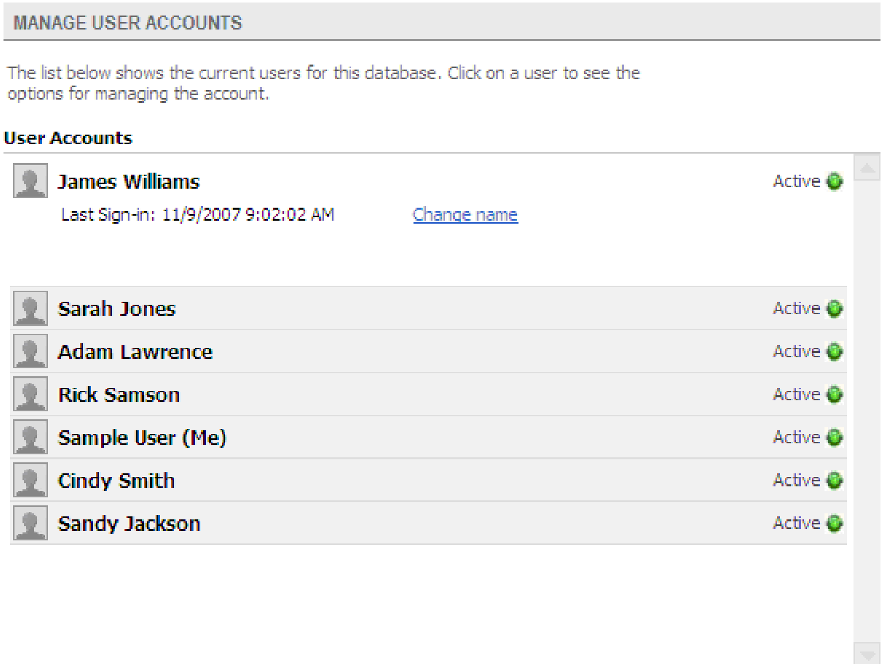
- Set or Change Administrative Password
- Remove Administrative Password (If you have set an Administrative Password)
- Manage User Accounts

Set or Change Administrative Password
You can set a password to protect the Settings section of GiftWorks. The Settings section includes administrative settings such as custom fields and values, accounting settings, and database backup settings. Enter an administrative password and hint to sign in to protect the Settings section.

Users still have access to all other areas of the GiftWorks database but will not be able to access or change the settings without the administrative password.

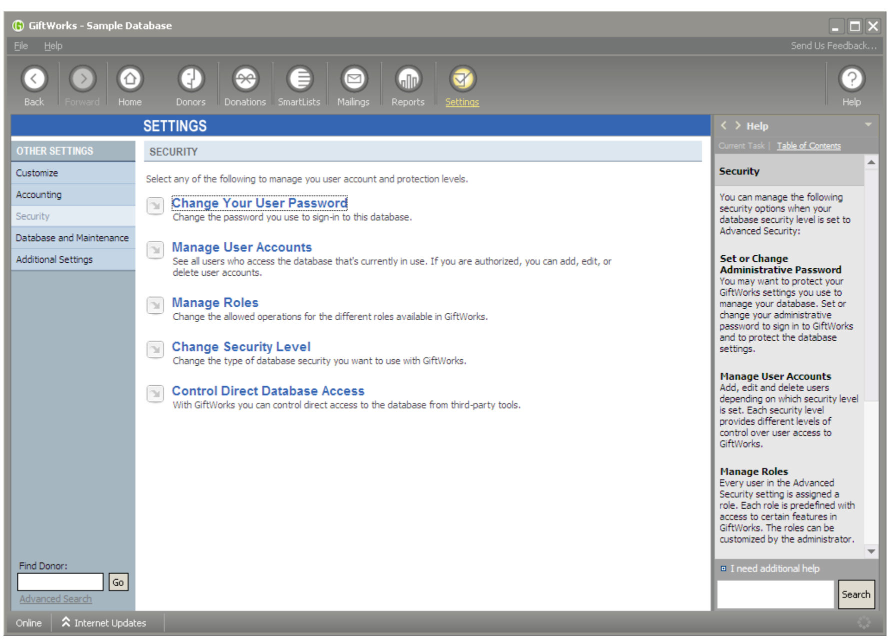


Manage User Accounts



In Basic Security, you can change any user's name. User names cannot be deleted and are used to track history as information is added or changed.

FOR PREMIUM USERS



The Security subsection has the following options:

- Change Your User Password
- Remove Administrative Password
- Manage User Accounts

- Change Security Level
- Manage Roles (only available if the security level is set to Advanced Security)
- Control Direct Database Access (only available if the security level is set to Advanced Security)

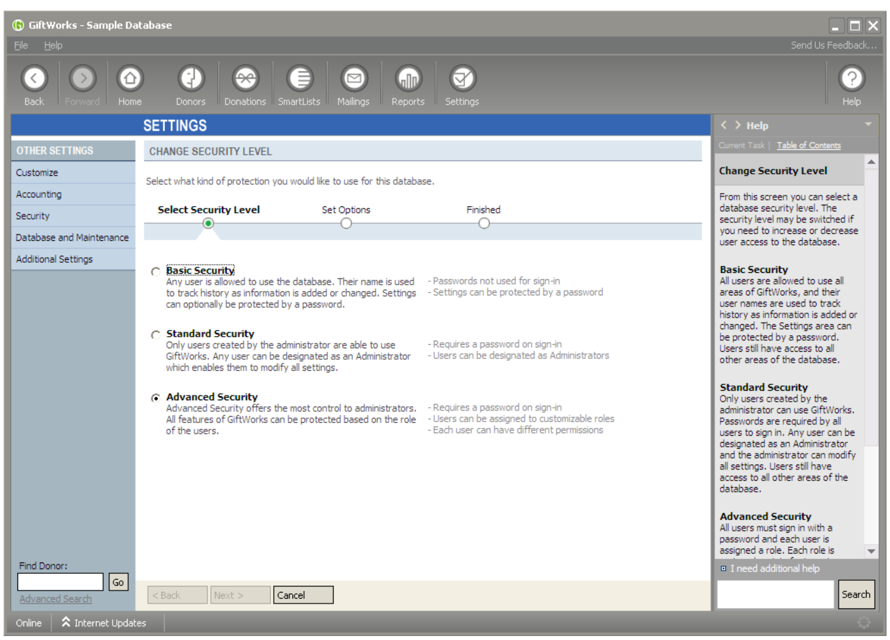
GiftWorks Premium is initially set to Basic Security. Before you set an administrative password or change security levels, see the ***Security Guide*** for more information about choosing the security options that are right for your organization.

Set or Change Administrative Password

You can set a password to protect the Settings section of GiftWorks. The Settings section includes administrative settings such as custom fields and values, accounting settings, and database backup settings. Enter an administrative password and hint to sign in to protect the Settings section. Users still have access to all other areas of the GiftWorks database, but will not be able to access or change the settings without the administrative password.

Change Security Levels

You can customize user access to and use of GiftWorks by selecting a security level.



The three security level options for protecting your database are Basic, Standard and Advanced. You can change security levels by selecting a different security level and clicking **Next** to continue.

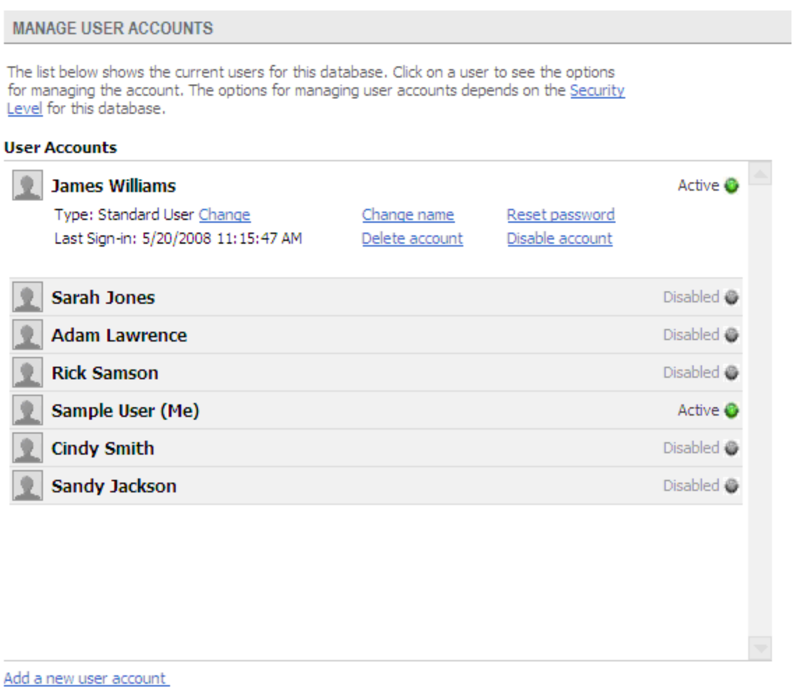
Basic Security
Any user can sign in to start working with GiftWorks. If you set an Administrative password, other users will not be able to access any database settings other than to change their user name.

Standard Security
Only users created by the administrator are allowed to sign in to GiftWorks. Passwords are required for all users to sign in, and an account must be activated prior to sign in. Users are designated as Standard or Administrator users.

Any user can be designated as an Administrator and any Administrator user can modify all settings. Standard users still have access to all other areas of GiftWorks. You can also manage user accounts and change security levels.

Advanced Security
Every user must sign in with a password, and each user is assigned a role. Each role is assigned certain features in GiftWorks that users in that role may access. In addition to managing user accounts and roles, you can change security levels and control direct database access.

Manage User Accounts
A GiftWorks Premium Administrator can add, edit and delete users depending on which security level is set. Each security level provides different levels of control over user access to GiftWorks. Select the user account you want to manage and click on a task to continue.



Managing User Accounts in Different Security Levels

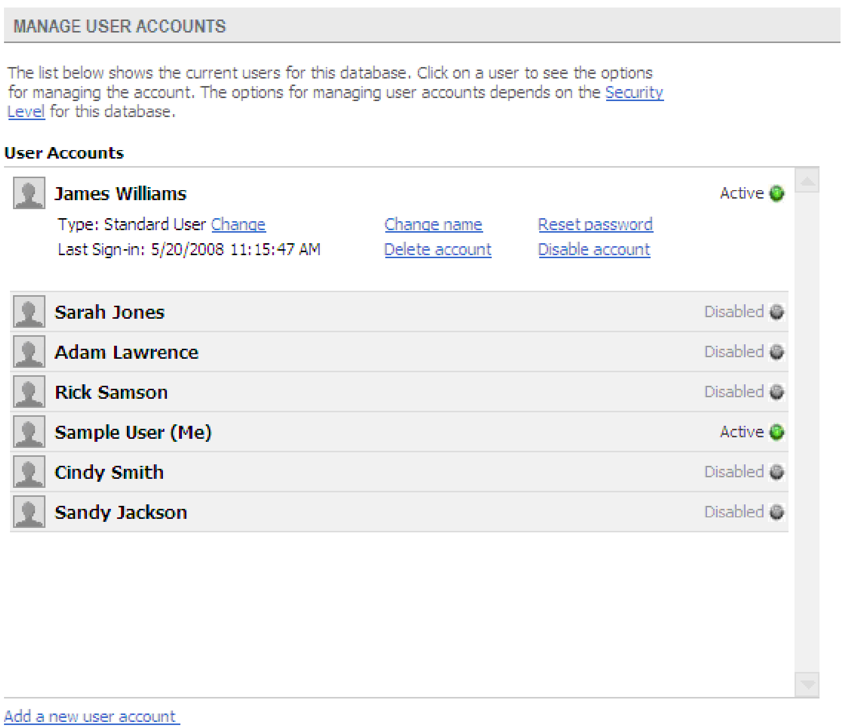
Options for managing user accounts depend on the Security Level you have selected for GiftWorks. Each security level provides different levels of control over user access to GiftWorks. Click on the User account you want to manage to begin.

Manage User Accounts in Basic Security

The only option you have is to change the user's name. Click on the Change Name link to change the **User name** and then click **Done**.

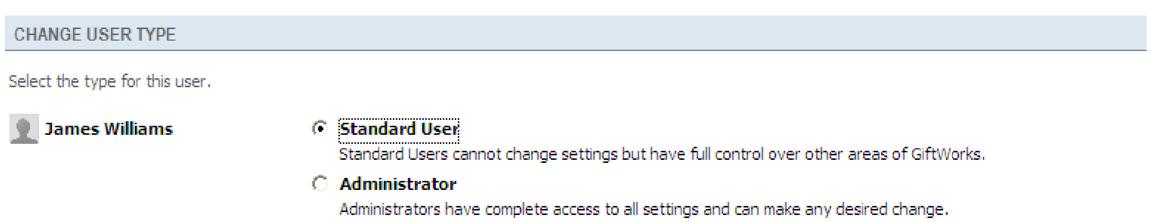
Manage User Accounts in Standard Security

You can change the user type, add a new user account, change the user name, set the password, activate/disable or delete a user account. Click on the user account you want to manage and then select the link for the option you want to manage.



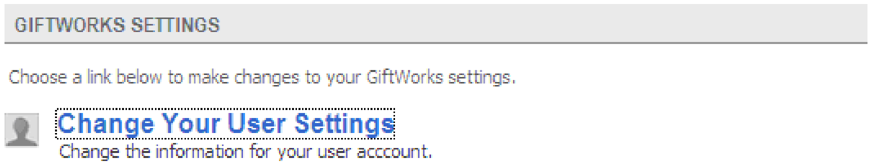
User Type in Standard Security

Users in the Standard Security setting can be designated as a Standard user or as an Administrator.



Standard Users can access all areas of GiftWorks except the administrative options in the Settings section.

When a Standard user selects the Settings section at the top, the only settings option for the Standard user is to change their user name and password. Click on **Change Your User Settings** and select **Change User Name** or **Change User Password** to continue.



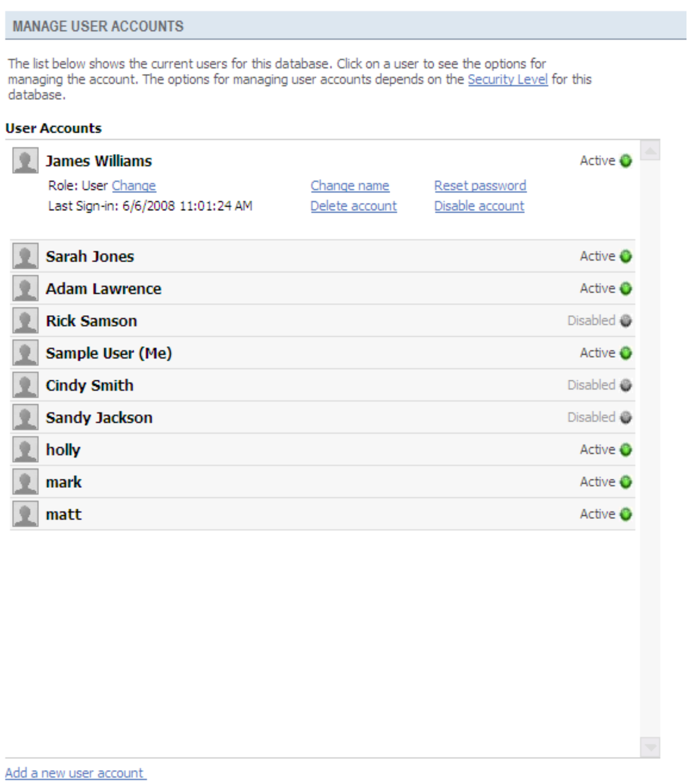
Administrator users can access all areas of GiftWorks including the Settings section. Administrators can also add a new user account, change user name, delete user accounts, set user passwords, and activate/disable user accounts. Users cannot sign in to GiftWorks until their user account is activated.

To activate an account, you must enter a password and select **Activate Account**.

Deleting an Account in Standard Security

User accounts can only be deleted if the user has not ever signed in to GiftWorks. Once the user has signed in, their account cannot be deleted because it would affect the history that is maintained for each user account. Accounts that cannot be deleted can still be disabled. When a user account is disabled, that user cannot sign in to GiftWorks.

Make any changes and click **Save** to continue.



Advanced Security

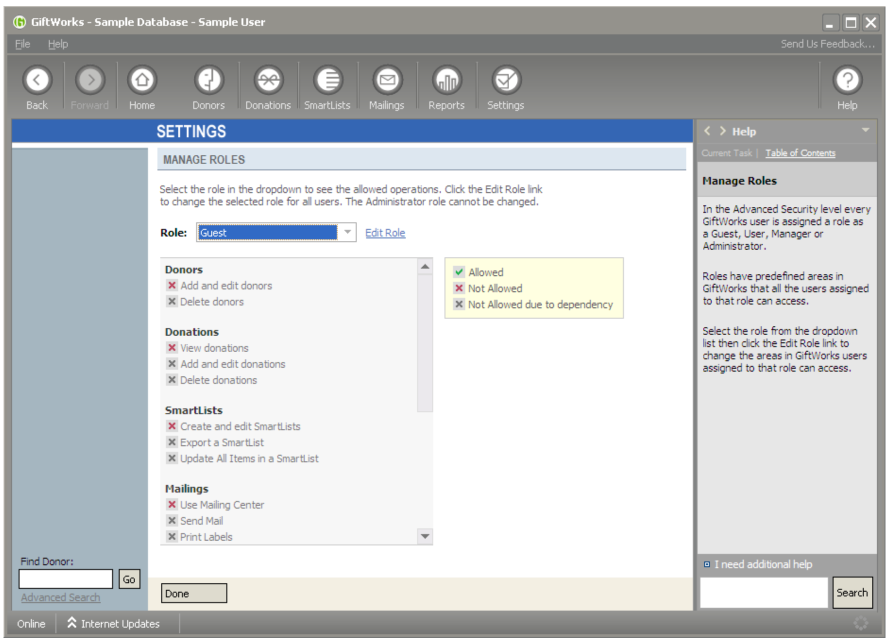
Manage User Accounts in Advanced Security

Administrators can add a new user account, change user name, delete user accounts, set user passwords, and activate/disable user accounts. Users cannot sign in to GiftWorks until their user account is activated.

To activate an account, you must enter a password and select **Activate Account**.

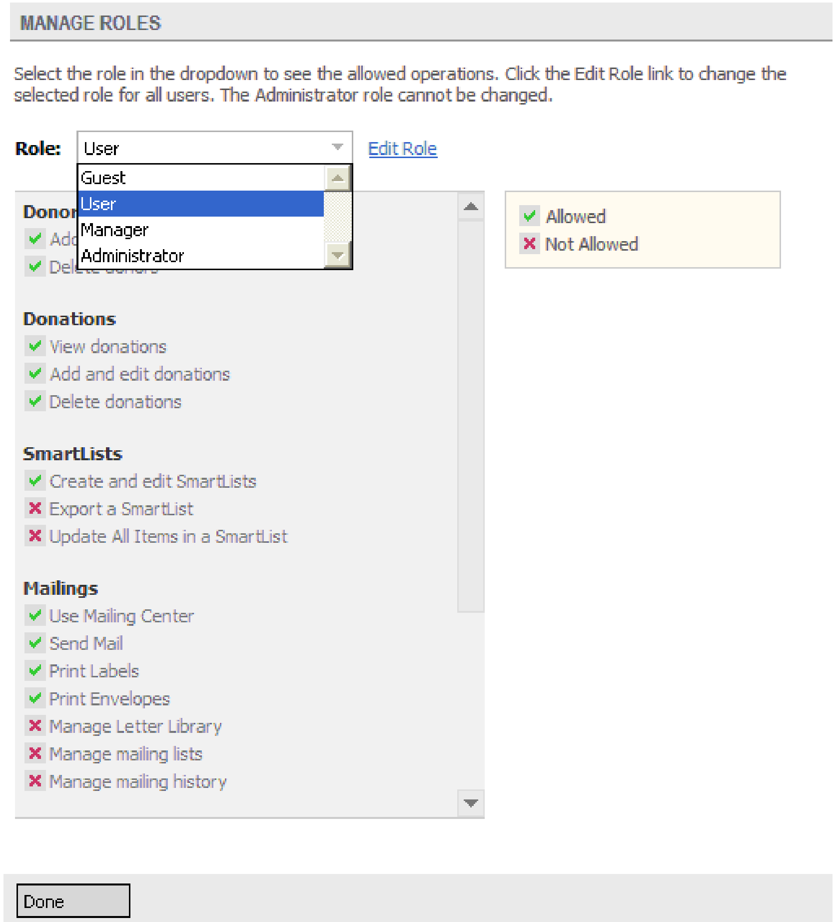
Delete an Account in Advanced Security

User accounts can only be deleted if the user has not ever signed in to GiftWorks. Once the user has signed in, their account cannot be deleted because it would affect the history that is maintained for each user account. Accounts that cannot be deleted can still be disabled. When a user account is disabled, that user cannot sign in to GiftWorks.



Manage Roles in Advanced Security

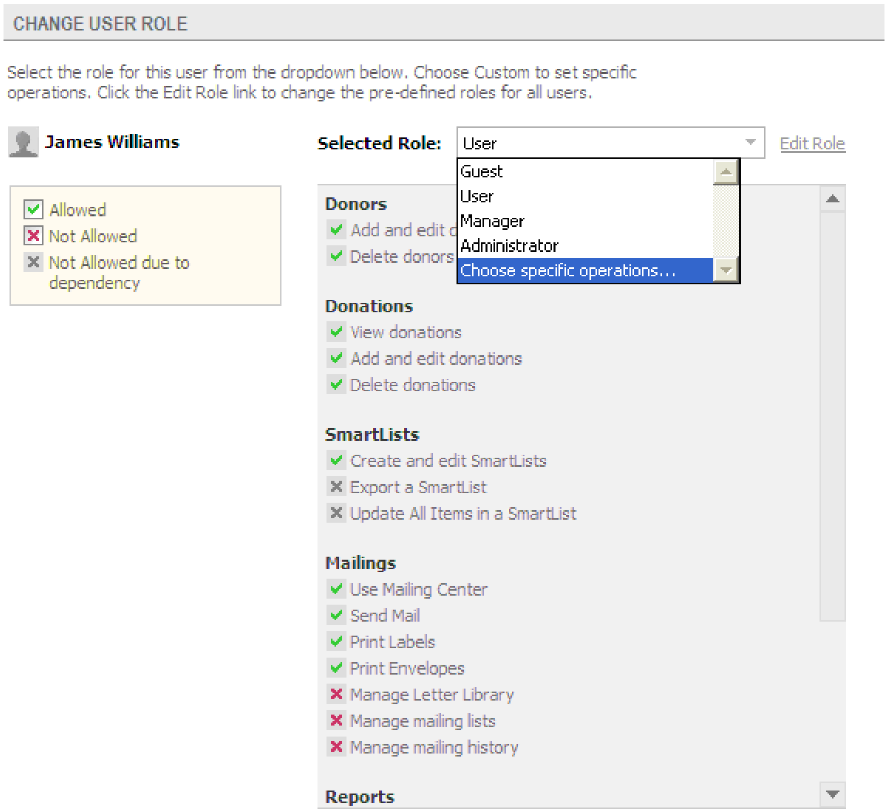
In the Advanced Security level every user is assigned a role as Guest, User, Manager or Administrator. Each role is predefined with access to certain features in GiftWorks. Roles can be customized by the administrator.



Select a role for the user from the dropdown box. You can edit the selected role by clicking on **Edit Role**. If you edit a role, the changes will be applied to all users assigned to that role.

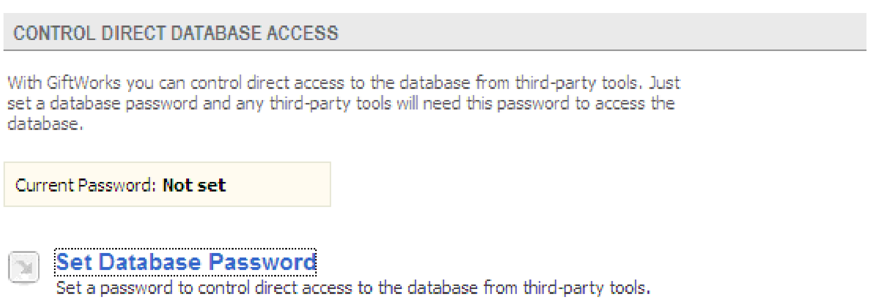
When you have finished making changes, click **Save**.

Customize User Role



If you want to customize database features an individual user can access, select the user from the Manage User Accounts screen and click on the **Change** link. Select **Choose specific operations** from the dropdown box and then select the features the user should and should not be able to access in the database. Click **Save** to continue.

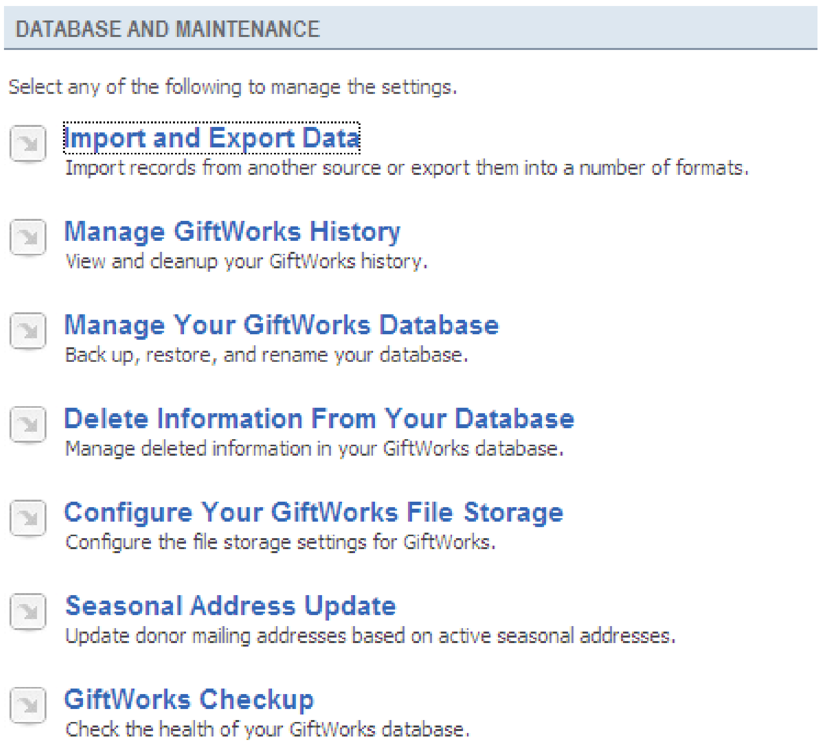
Control Direct Database Access in Advanced Security



Secure your database from being viewed or modified by third-party tools and programs by setting a database password. If you change your database security level from Advanced to Standard or Basic security, your Database Password will be cleared during the change. The feature is only available in Advanced Security.

DATABASE, FILES AND MAINTENANCE

The Database and Maintenance subsection of the Settings section contains the options for working with your database file.



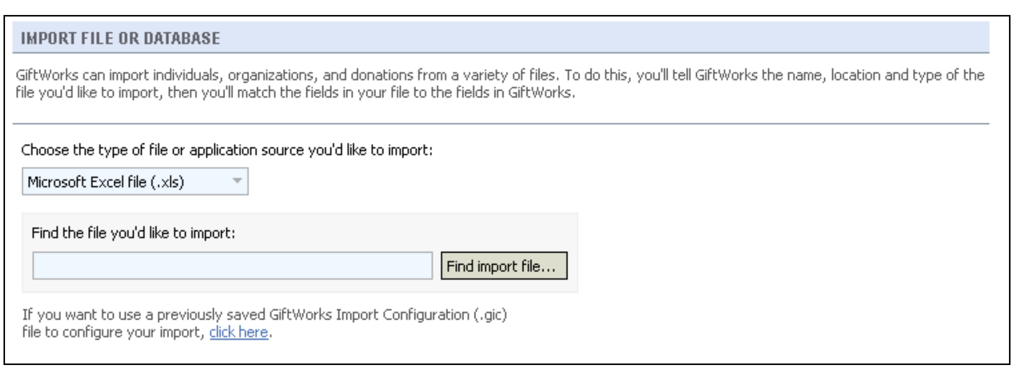
PREMIUM

Seasonal Address Update is only available in GiftWorks Premium.

The Database and Maintenance subsection has the options explained below.

Import and Export Data

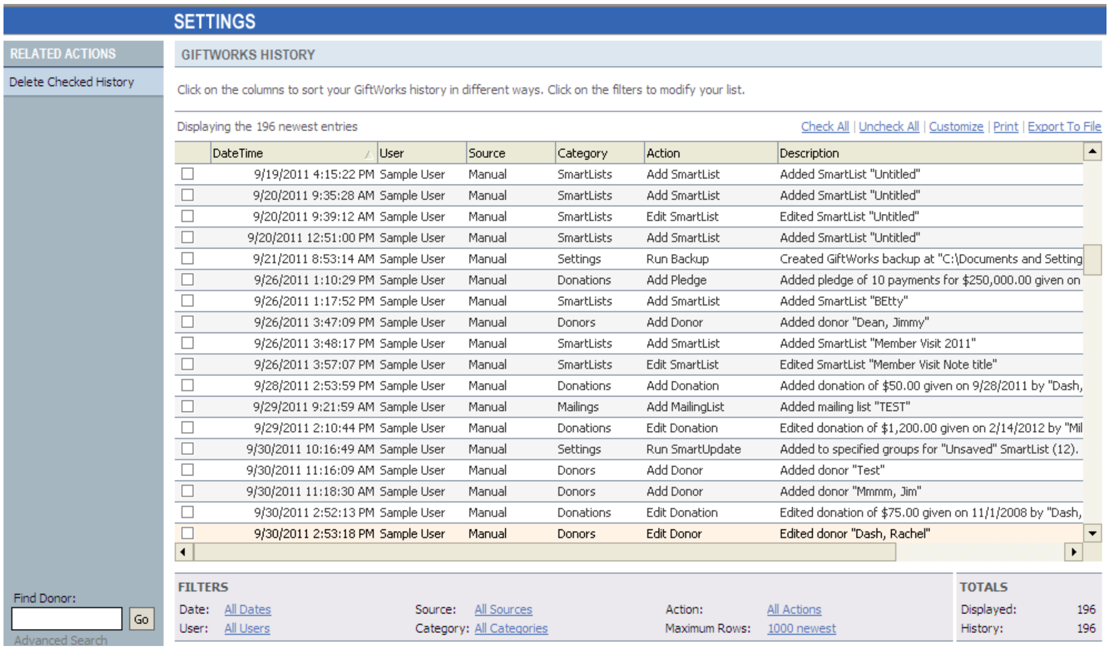
GiftWorks can import data from Microsoft Excel (.xls, .xlsx), Comma-separated value (.csv), or Microsoft Access (.mdb, .accdb) files. If your existing data is not in one of these formats, you can probably export it from your current application to one of the formats. Consult your existing application's manual for information on exporting data.



GiftWorks can export data to Microsoft Excel (.xls), XML or Comma-separated value (.csv) files. You can export the data of your choice from any SmartList.

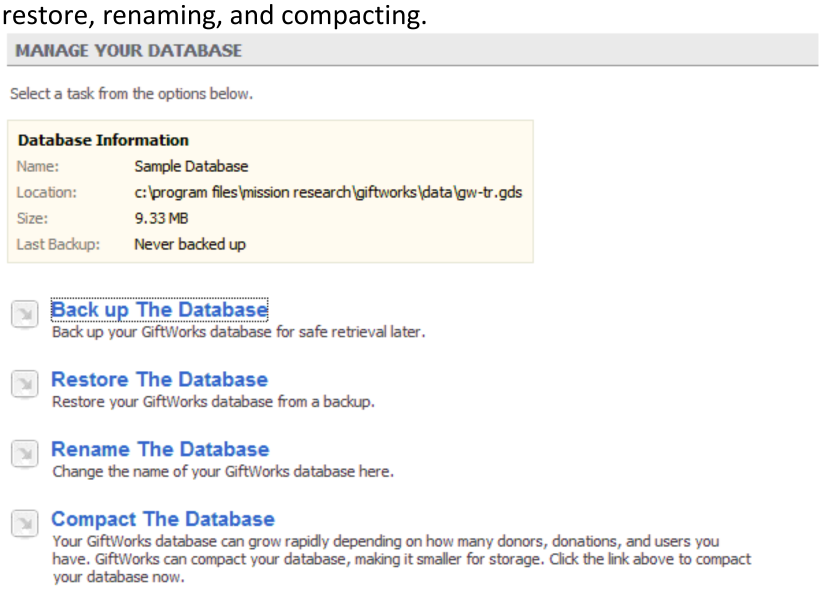
Manage GiftWorks History

Allows you to view and clean up actions of your GiftWorks Users.

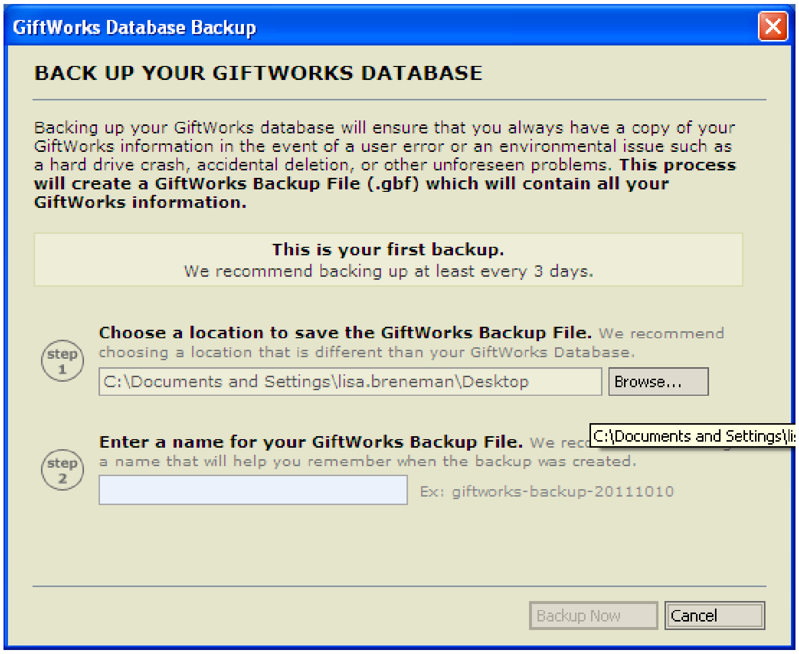


Manage Your GiftWorks Database

This subsection contains maintenance tasks for your GiftWorks database file, including backup and restore, renaming, and compacting.

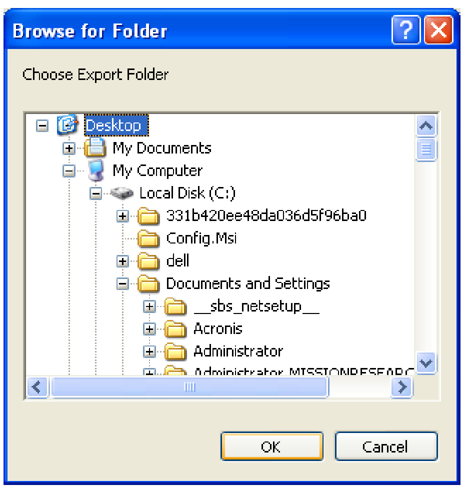


Back up The Database It is recommended that you regularly back up your database file, and also that you back it up before and after any major changes (such as an import, batch update, or large data-entry effort).

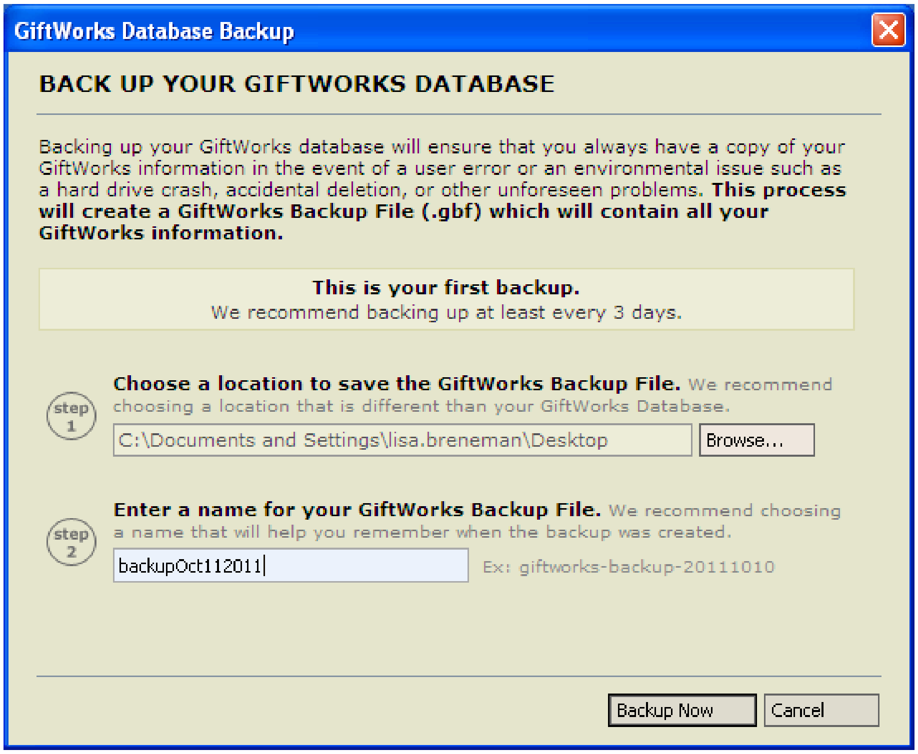


Step 1:

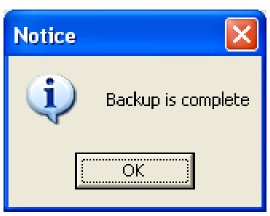
Click Browse and choose the location



Step 2: Type in a name for your back up file



Click Backup Now

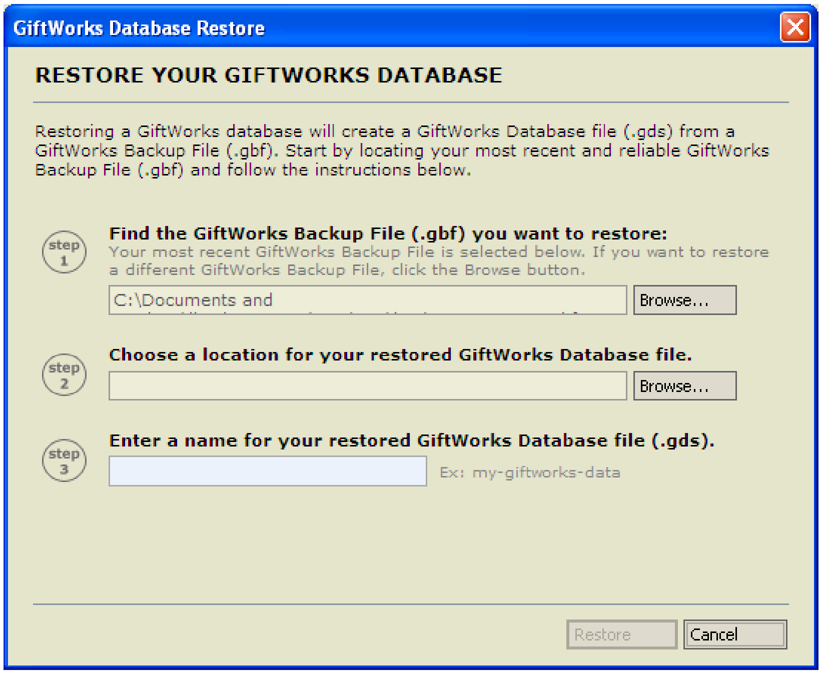


Restore The Database

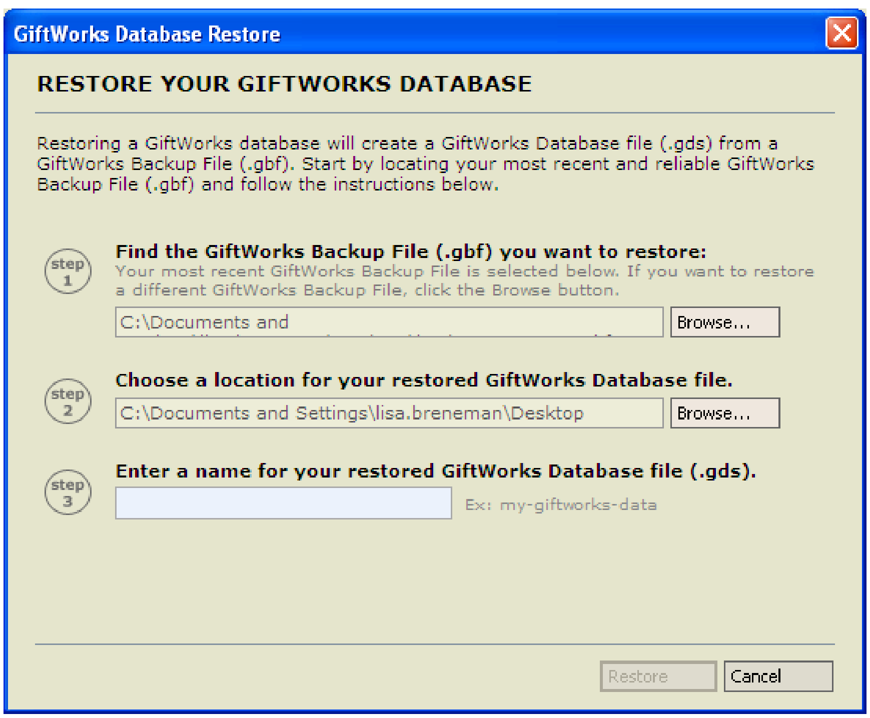
You can restore a back up file at any time. You can do this from Settings or from the Sign In screen.

Here you will see a dialog box with 3 steps

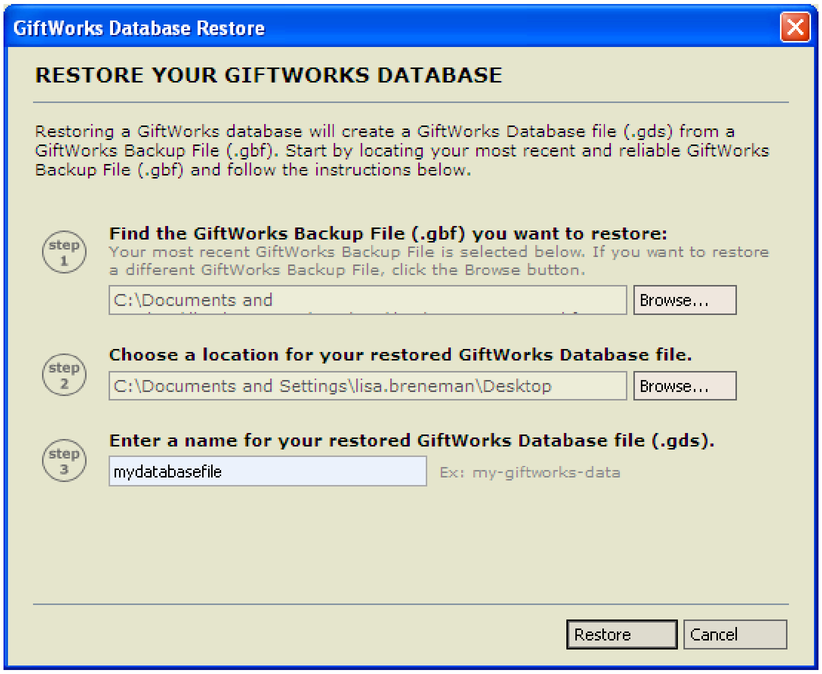
Step 1: Find your back up file (the .gbf file)



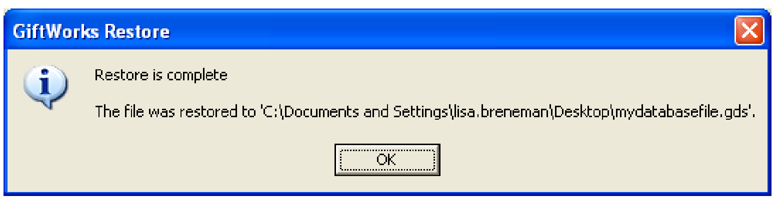
Step 2: Choose a location for your restored GiftWorks database file (the .gds file).



Step 3: Give your new database file a name

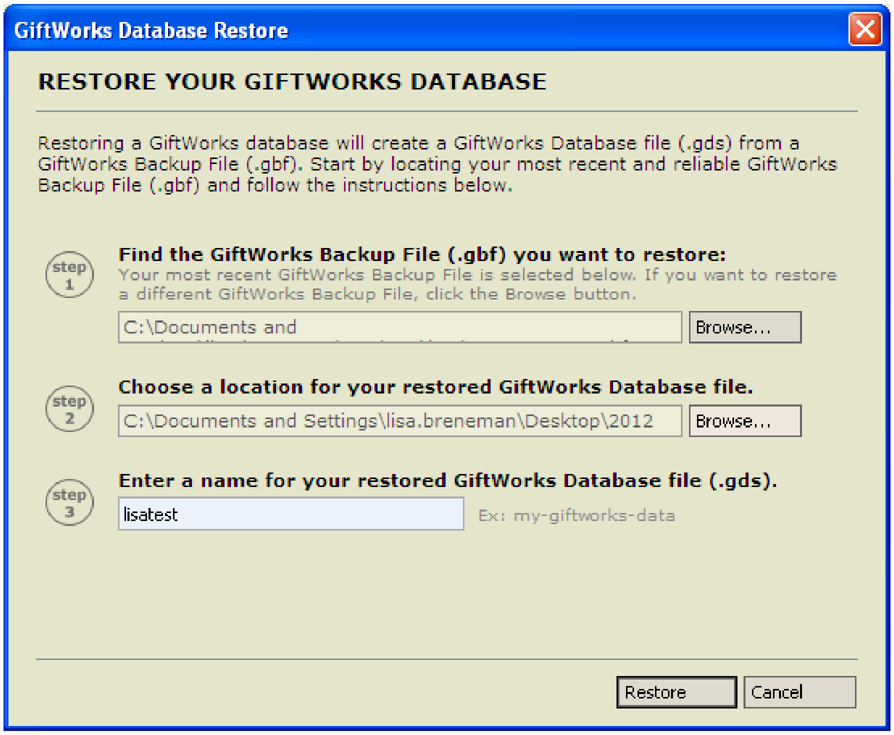


Click Restore

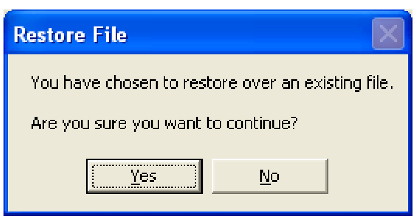


Sign In to the database file.
To do this click on the “Options” tab to the right of the Database name.
Choose “Select an existing database” and then click “Browse”.
Find the database file you restored, click on it, and then click open.
Click Next.
Now choose your User Name and then click Done.
Now click on Sign in.

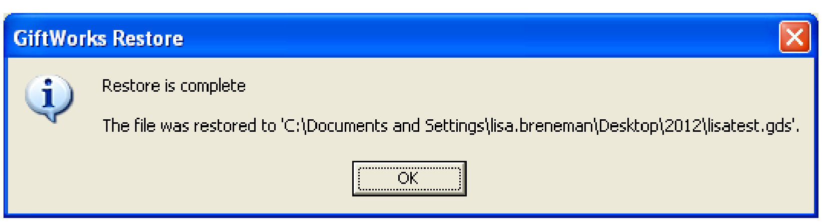
****NOTE: If you want to restore the back up file into an existing database file, you will need to choose the exact same location (Step 2) and the exact same database name (Step 3)**



Click on Restore - If you have chosen to overwrite an existing database file, a prompt will appear stating "You have chosen to restore over an existing file. Are you sure you want to continue"



Click Yes



A dialog box will appear when the Restore is complete – click Ok

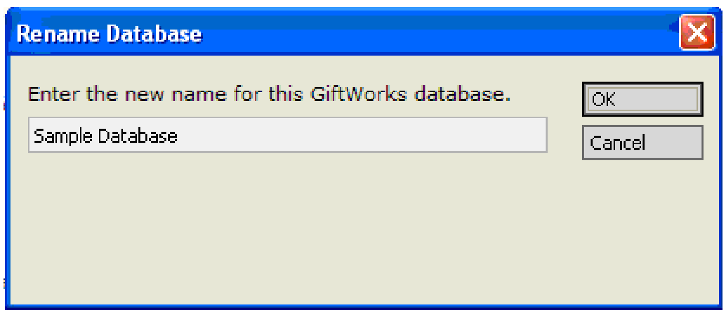
*****NOTE: If you have GiftWorks installed on multiple computers and you have created a new database file, you will need to make sure that all of the users sign in to the new database file in the new location.**

Rename The Database

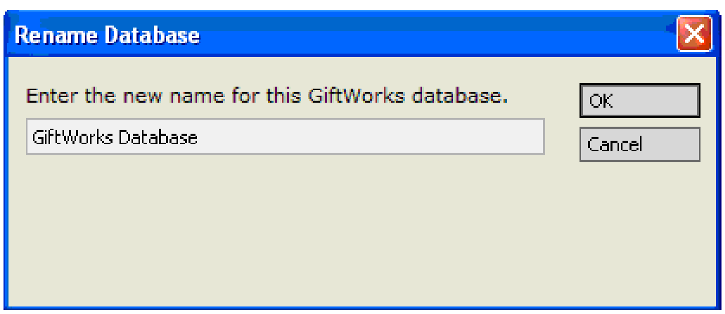
You can change the way the Database name is displayed within GifWorks

On the Sign In screen you will see the name of your Database. The example below shows the Database as: Sample Database

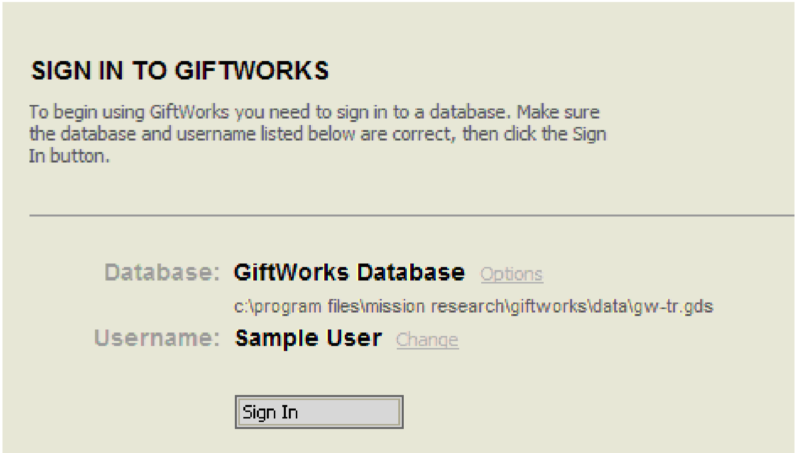
To change this, click on the Rename the Database option. You will see the current name.



Remove this and type in a new name.

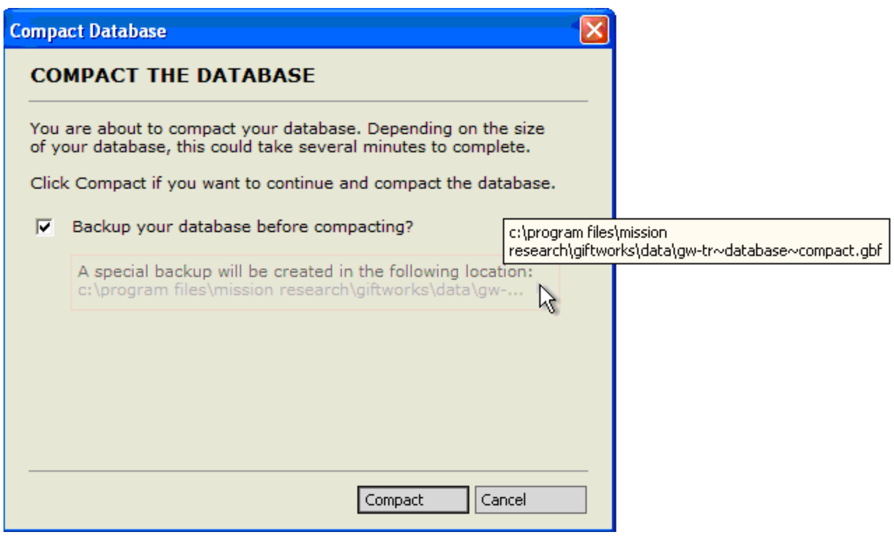


Now when you go back to the Sign In screen you will see the new name.

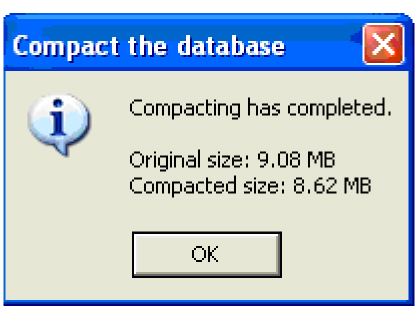


Compact The Database

Compacting your database can decrease the amount of disk space it takes up, and may make it operate more efficiently. GiftWorks will also create a backup copy of your GiftWorks database in the same folder when you compact the database in case of compact errors. You can then restore the backup file (named as databasename~database~compact.gbf) of your database.



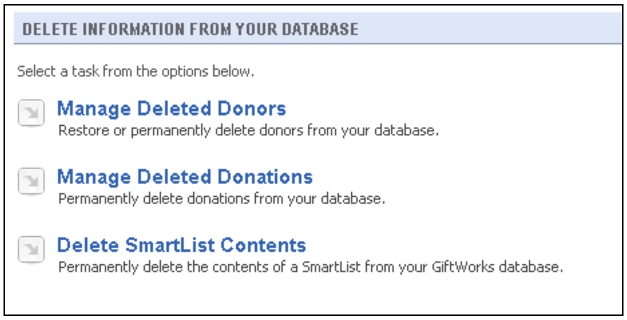
You will see a prompt when the process is finished



Click Ok.

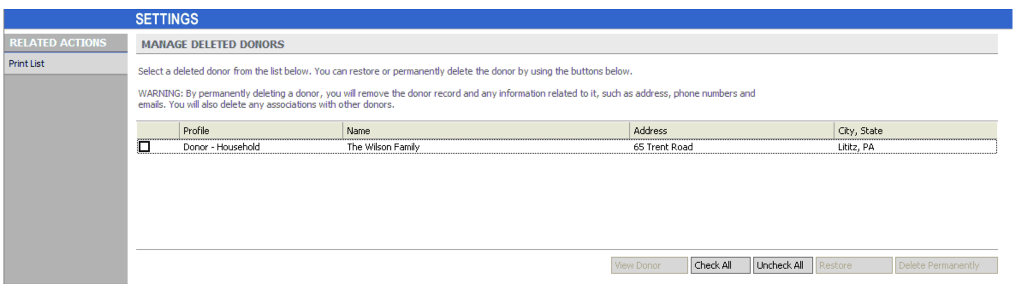
Deleting Information from Your Database

When you delete a donor or donation from GiftWorks using **delete this donor**, or **delete this donation**, each is marked for deletion, but is not permanently deleted from your database. You must visit this area of GiftWorks to permanently delete them. You can also restore donors that you do not want to delete.

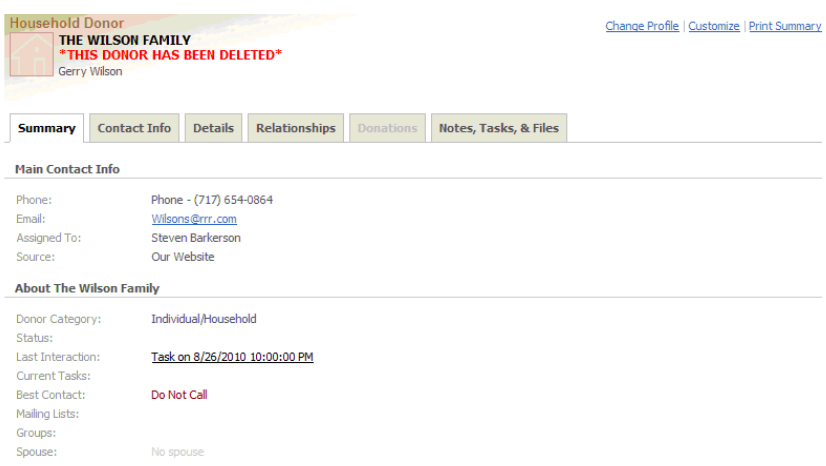


Manage Deleted Donors

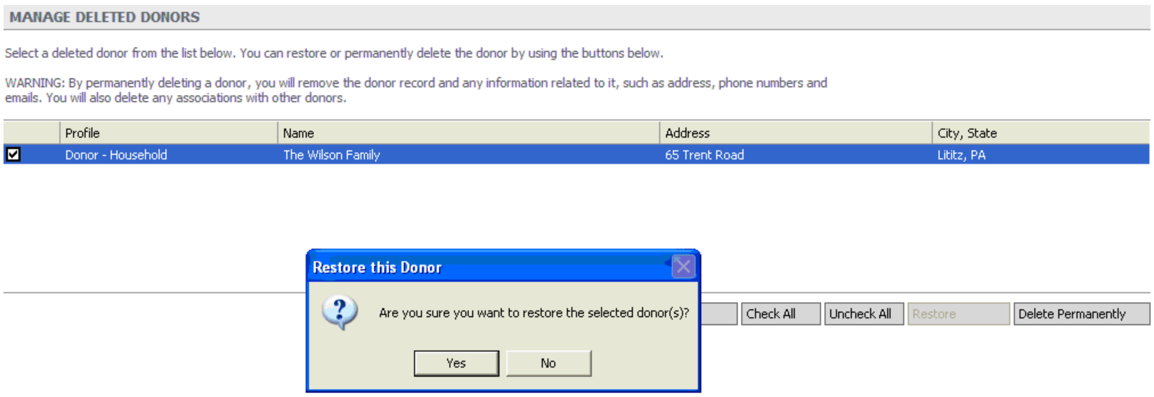
You can print the list of Deleted Donors by clicking on Print List under the Related Actions area on left



You can view a donor in this area by checking the box next to their name and clicking on View Donor button.

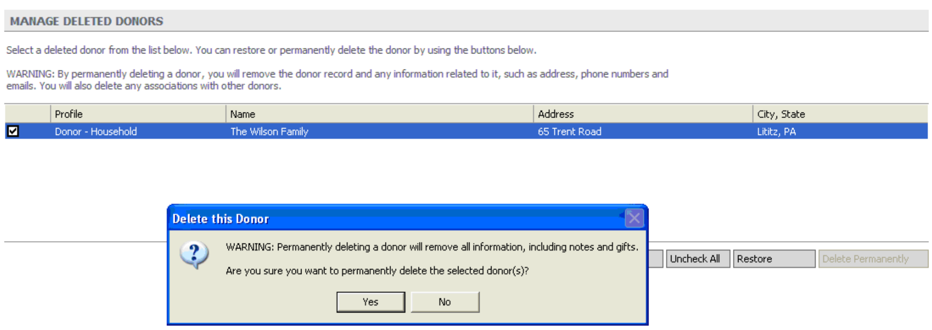


You can also Restore any or all donors in this area. Check the box next to the Donors to restore or click Check All to check all donors on the list.



Click Yes to Restore.

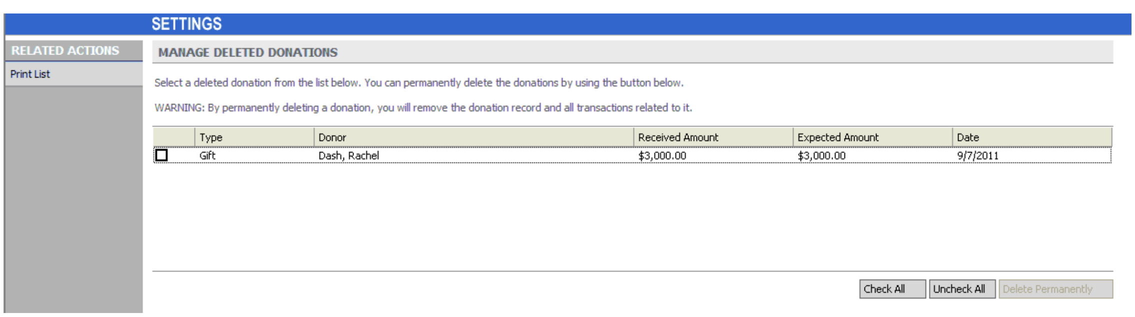
You can also permanently delete the donors from your database file. You can also delete any or all donors in this area. Check the box next to the donors to delete or click Check All to check all donors on the list.
Click on Delete Permanently. You will see the following warning message



Click Yes to continue or No to Cancel.

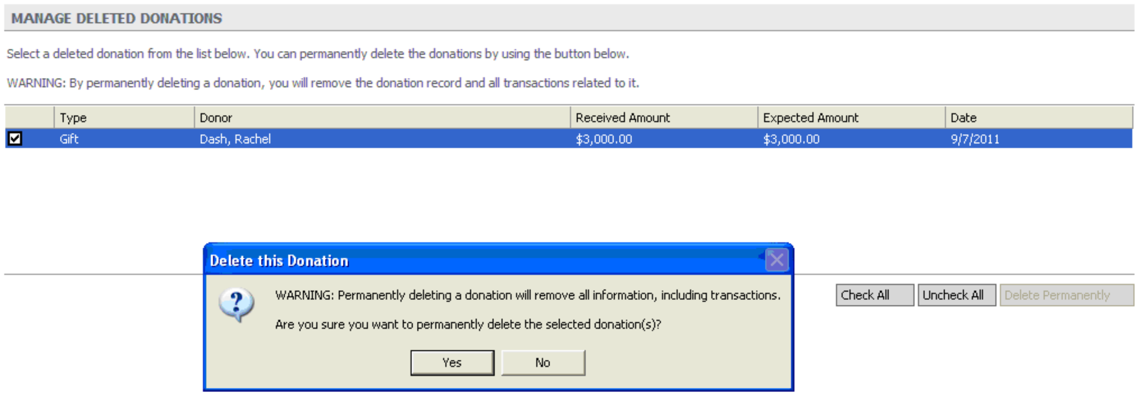
Manage Deleted Donations

You can print the list of Deleted Donations by clicking on Print List under the Related Actions area on left



You can also permanently delete the donations from your database file. You can also delete any or all donations in this area. Check the box next to the donations to delete or click Check All to check all donations on the list.

Click on Delete Permanently. You will see the following warning message

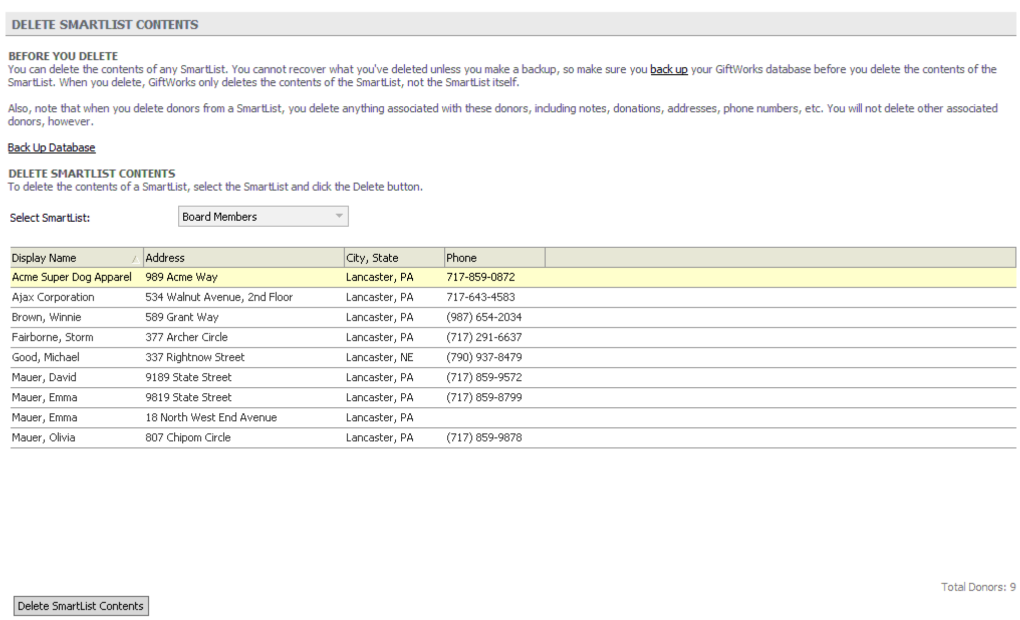


Click Yes to continue or No to Cancel.

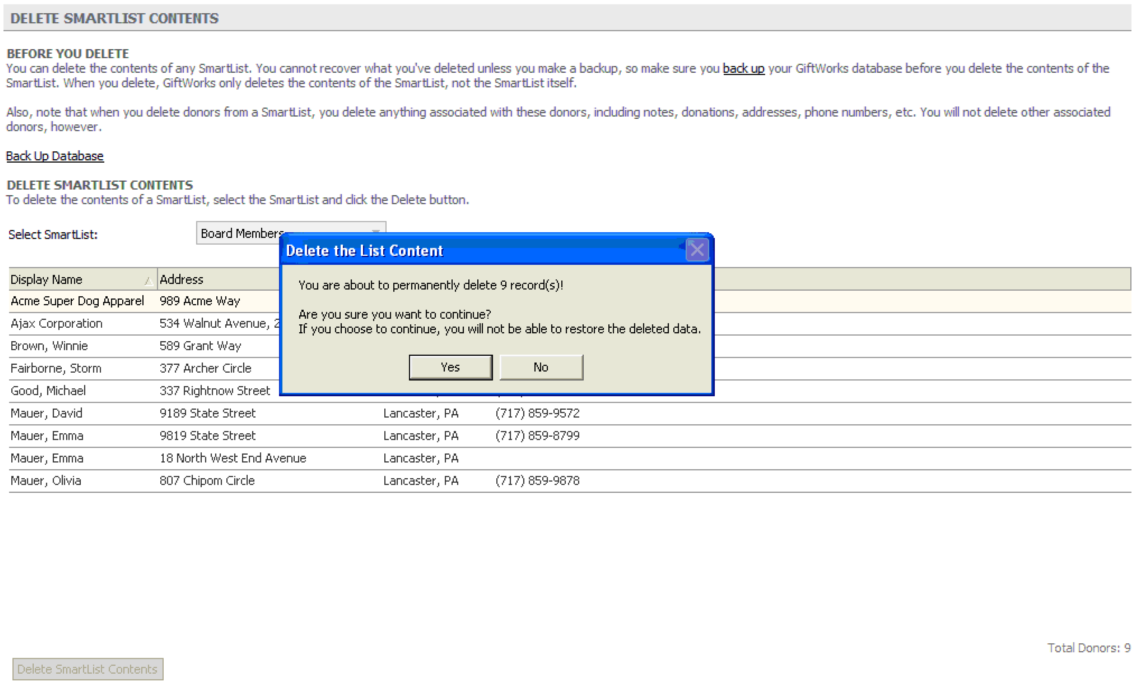
Delete SmartList Contents

You can also permanently delete the contents of any SmartList. NOTE: that this is not reversible, so it should be used with care. Always back up your database before you make a significant change.

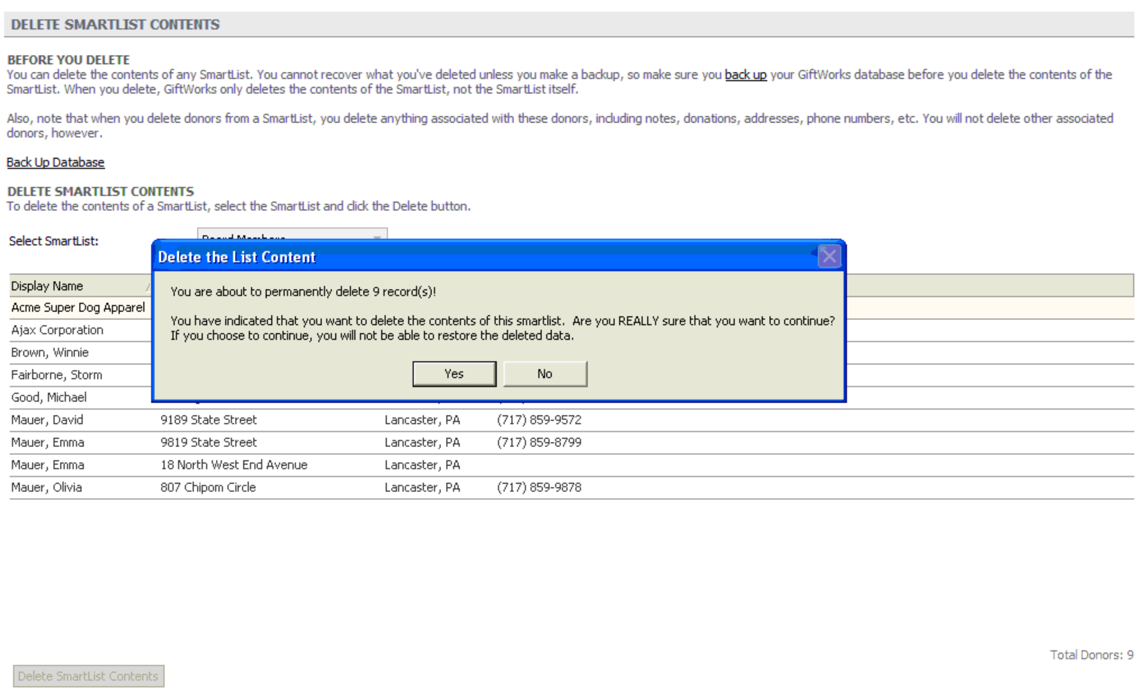
Choose a SmartList from the Select SmartList field



Click on Delete SmartList Contents button. You will see the following warning.



Click Yes to continue or No to Cancel. If you click Yes,you will then see a second warning message.



Click Yes to continue or No to Cancel.

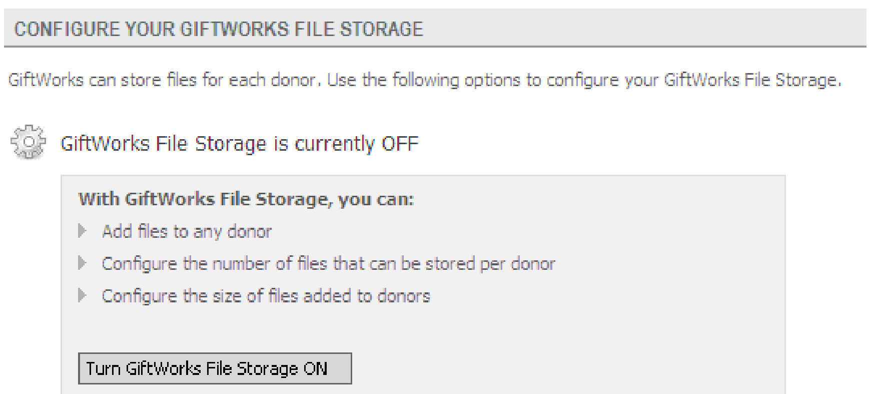
Configure Your GiftWorks File Storage

You can attach documents to donors to keep that important information easily accessible. This could be used to save additional pictures, documents, contracts, information sheets, etc. for a donor.

The attachments will show in the Notes/Tasks/Files tab
The Administrator has to turn this feature on and can set file limits per donor. GiftWorks Standard can have up to 5 files per donor and GiftWorks Premium can have up to 200 files per donor
The Administrator can also set a maximum file size

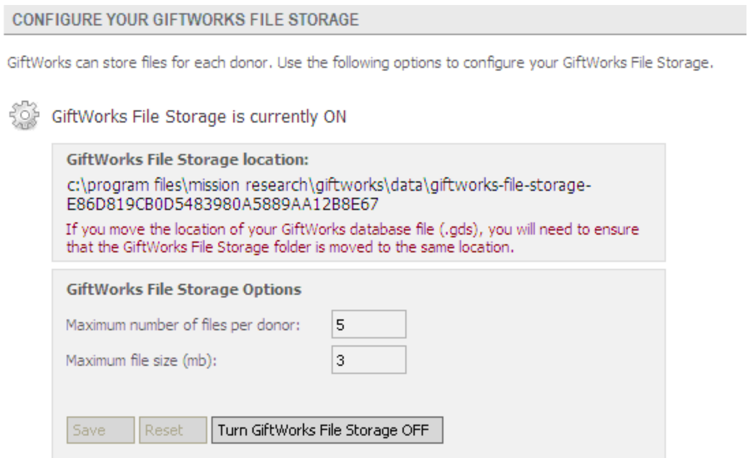
These attached files will not be stored in the .gds file (they will be saved in the same location that the .gds file is saved in – the folder will be named "giftworks-file-storage…."
These attached files will be included within a back up file
******If you move the .gds file you will also need to move the folder that contains the attached files – or just restore the back up file (this is the easiest way)**

Click on the 'Turn GiftWorks Files Storage On' button to activate it.



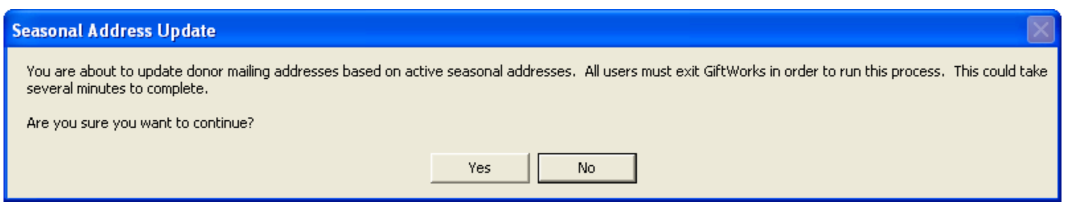
Click Yes to confirm

Choose the Maximum number of files per donor and the Maximum file size. Then click Save.



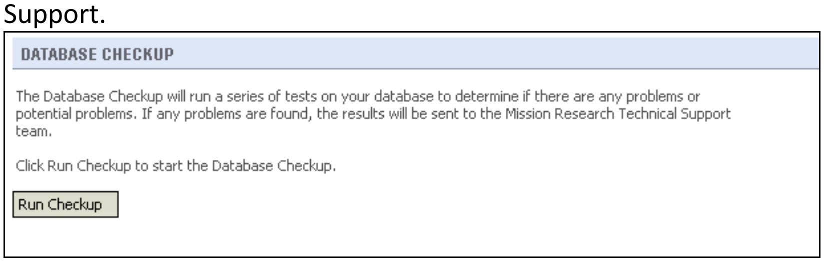
Seasonal Address Update (PREMIUM only)

You can run a seasonal address update and all donor mailing addresses will be updated. Any active seasonal addresses will become the current mailing addresses for those donors based on the current date. Note that this update is automatically run each time you sign in to GiftWorks, so you should not normally need to run this update manually.

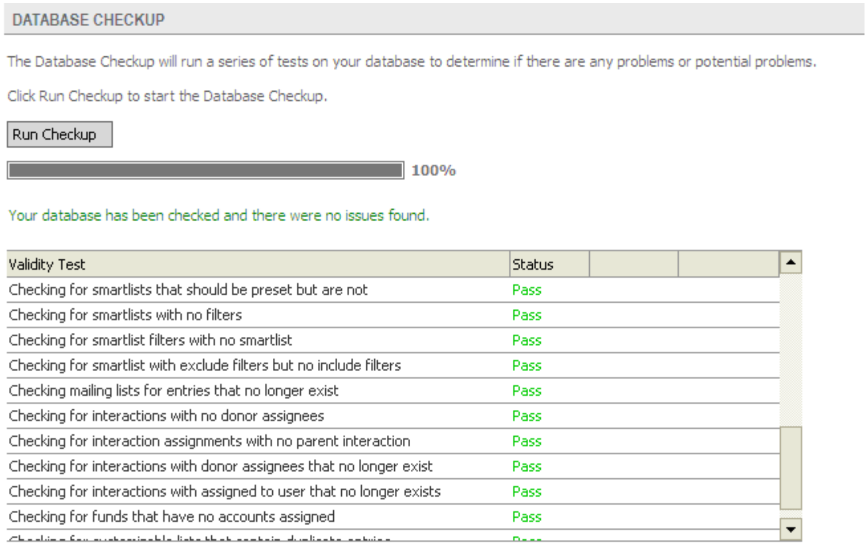


GiftWorks Checkup

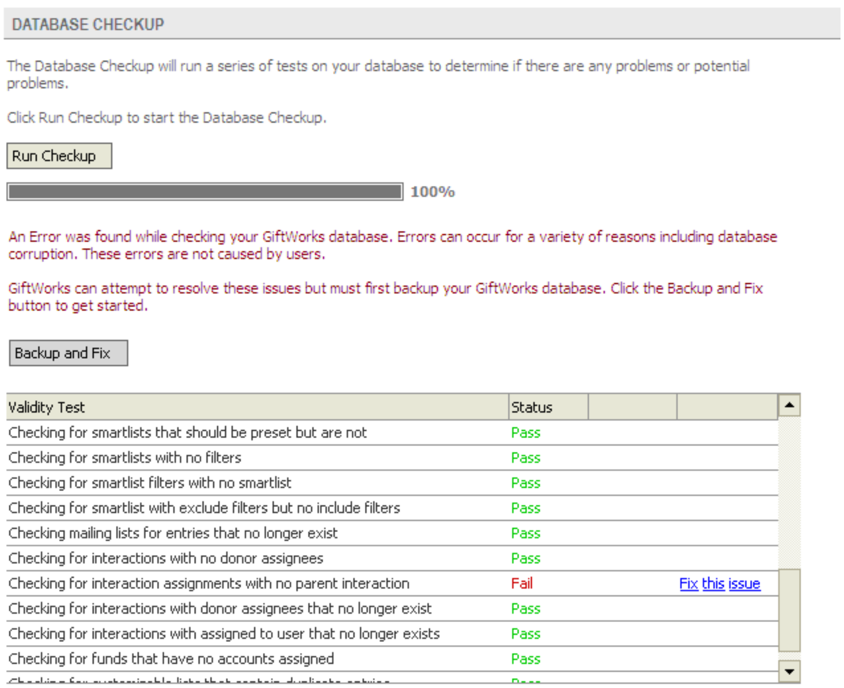
GiftWorks can perform a variety of tests on your database to check for inconsistencies or other problems. Normally, you will only need to run the checkup if advised to do so by GiftWorks Support.



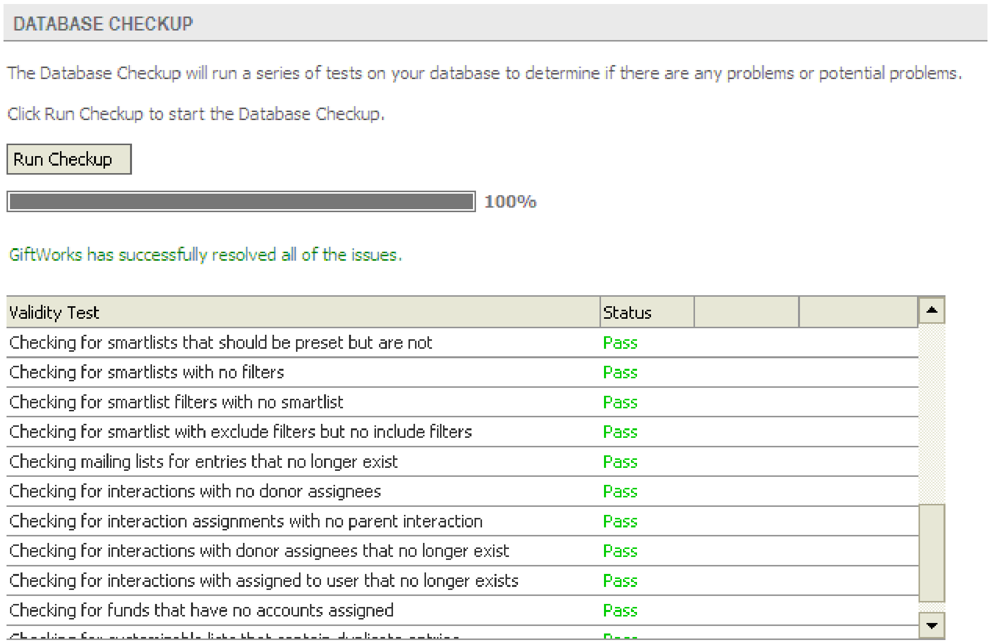
Click on Run Checkup. If there are no errors, you will see the following:



If there are check up errors you see a screen stating that errors were found



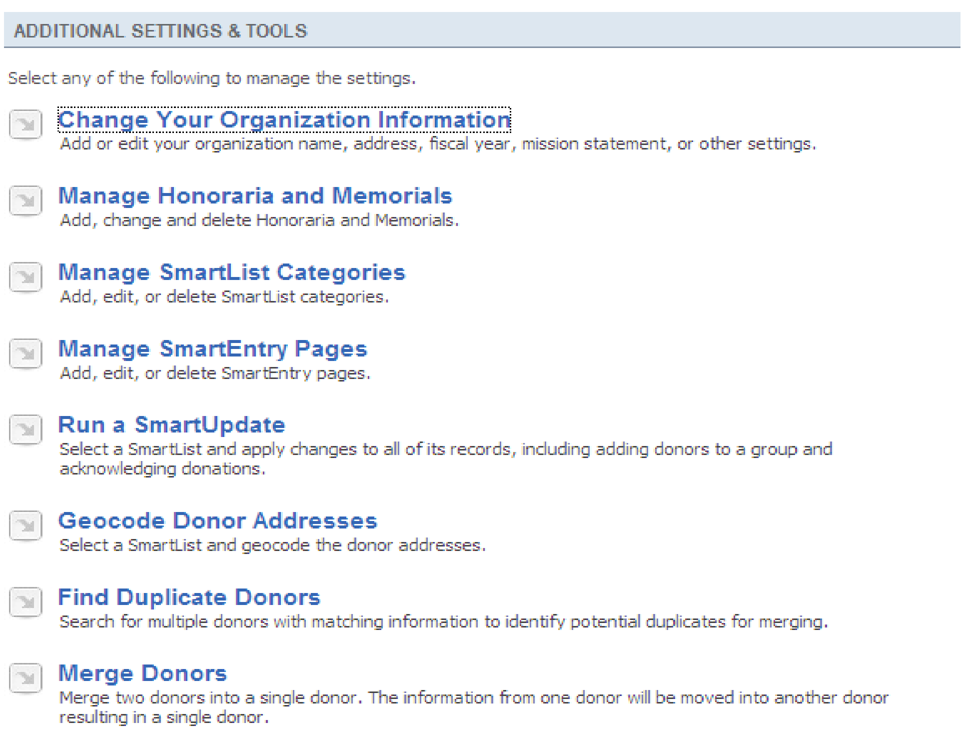
You can click on Backup and Fix. If the errors are corrected you will see the following**:**



If the checkup errors are not fixed, contact GiftWorks Customer Care for further instructions.

ADDITIONAL SETTINGS & TOOLS

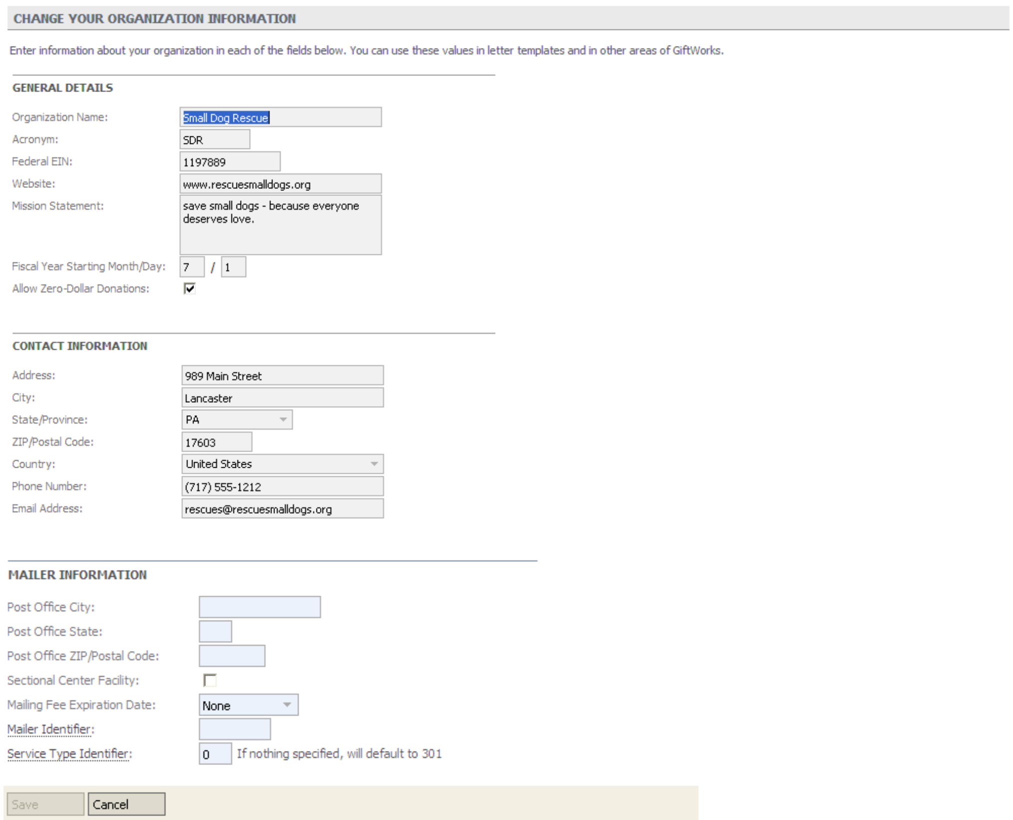
The Additional Settings subsection of the Settings section contains other administrative options for your GiftWorks database.



See below for more information on Additional Settings.

Change Your Organization Information

GiftWorks lets you enter a variety of information about your organization. This information can be used in mailings and other areas of GiftWorks. Entering the data in this subsection of Settings ensures that your organization's information is always presented in a consistent manner.



The information that can be stored about your organization is:

- Organization Name
- Acronym (initials)
- Federal EIN
- Website Address
- Mission Statement
- Fiscal Year Starting Month/Day
- Allow Zero-Dollar Donations
- Address
- City
- State/Province
- ZIP/Postal Code
- Country
- Phone Number
- Email Address

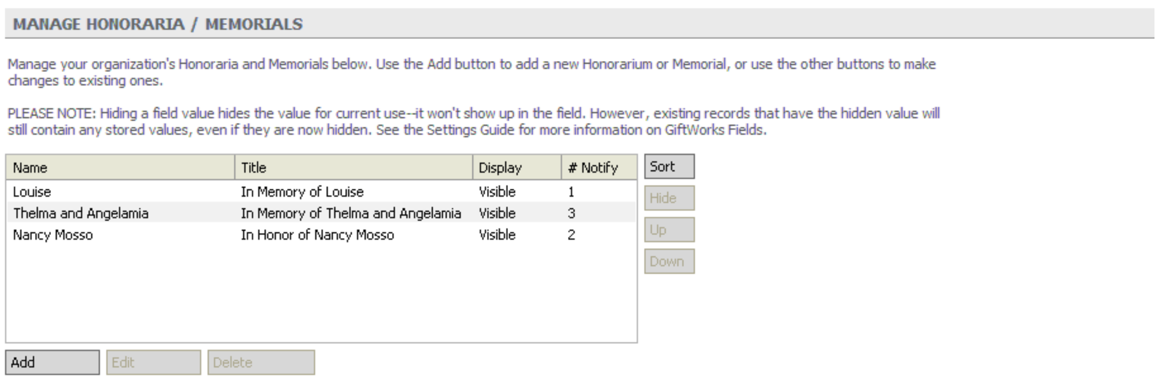
MAILER INFORMATION is only available in GiftWorks PREMIUM

GiftWorks Premium can also store:

- Post Office City
- Post Office State
- Post Office ZIP/Postal Code
- Sectional Center Facility
- Mailing Fee Expiration Date
- Mailer Identifier
- Service Type Identifier

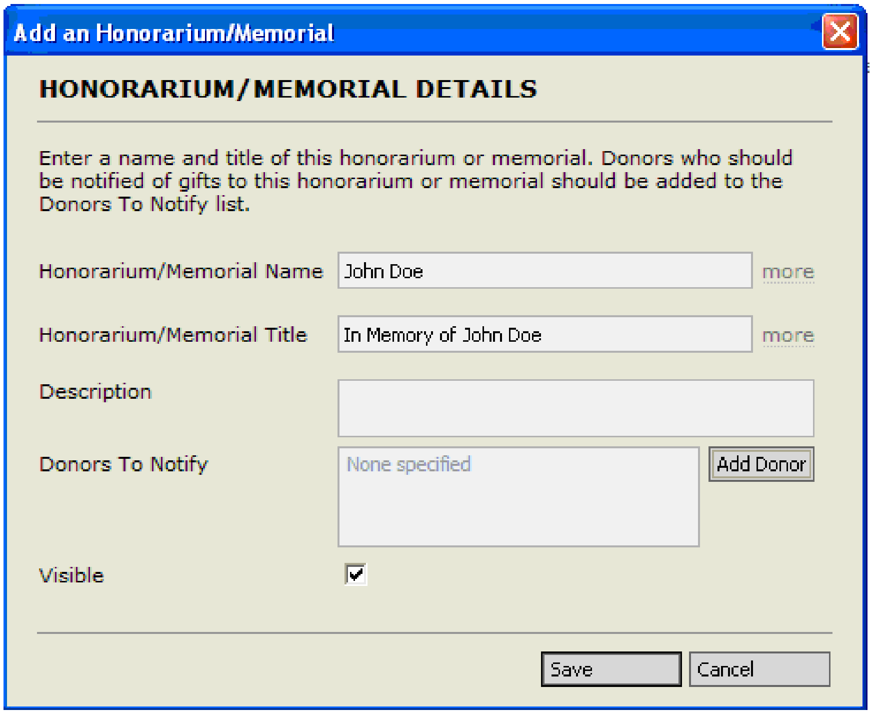
Manage Honoraria and Memorials

GiftWorks lets you track donations given “in honor of” or “in memory of” someone or something. You can enter information about those honoraria or memorials in this subsection of Settings.

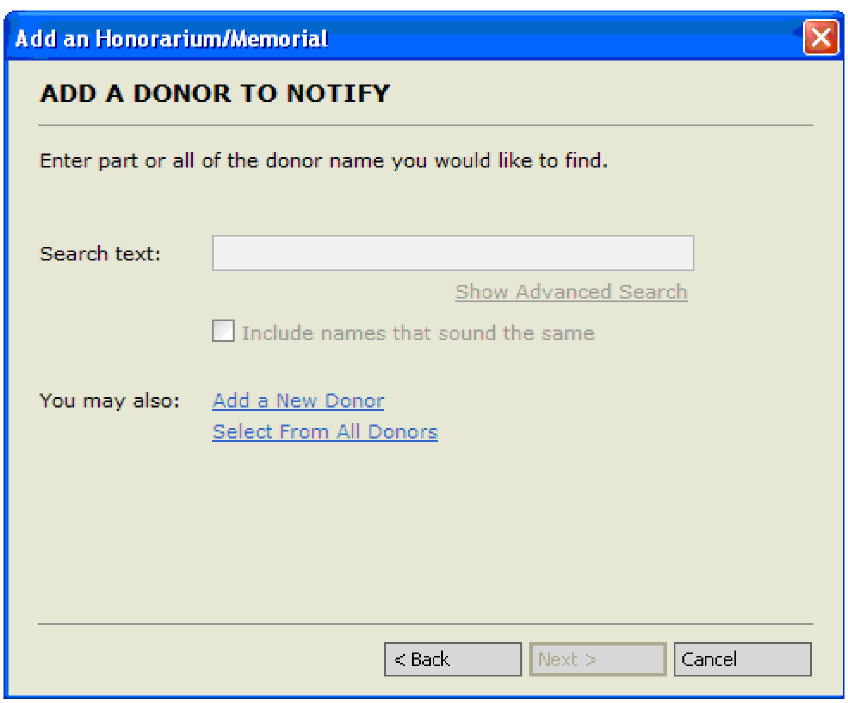


The information you can track for honoraria or memorials is:

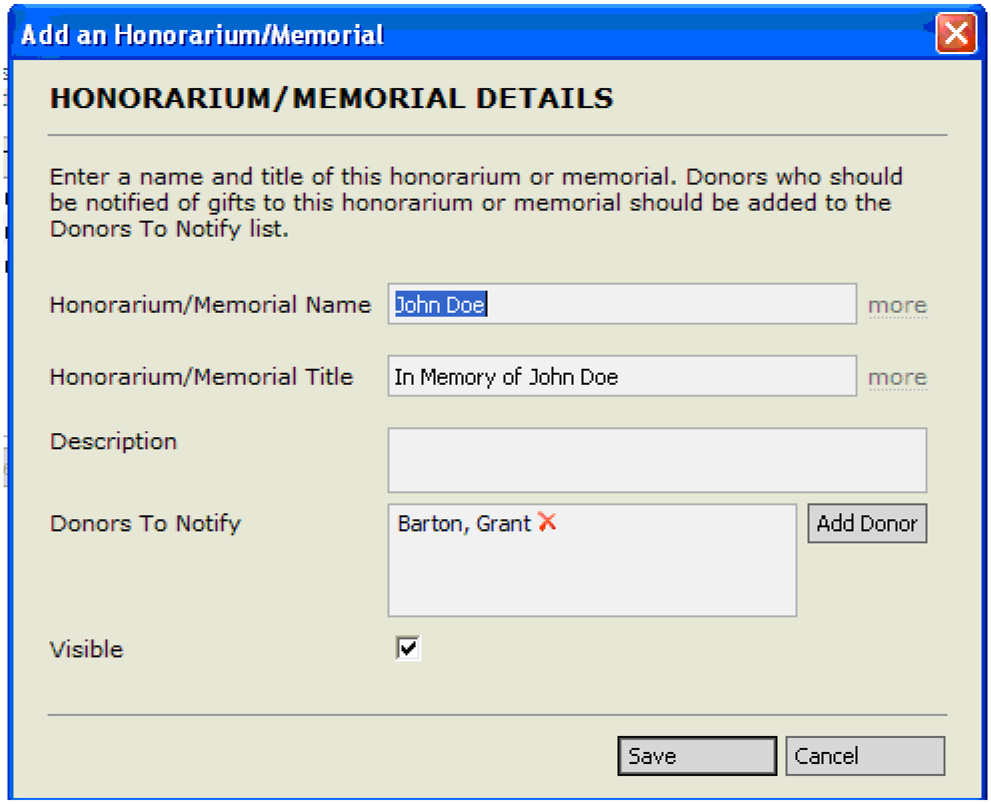
- Name of the honorarium or memorial (for example, John Doe)
- Title of the honorarium or memorial (for example, In Memory of John Doe)
- Description
- Donors that should be notified of new gifts (for example, family members)
- You can also “hide” existing entries that are no longer used



To add a Donor to Notify click on the Add Donor button. Here you can search for an existing donor or add a new donor.



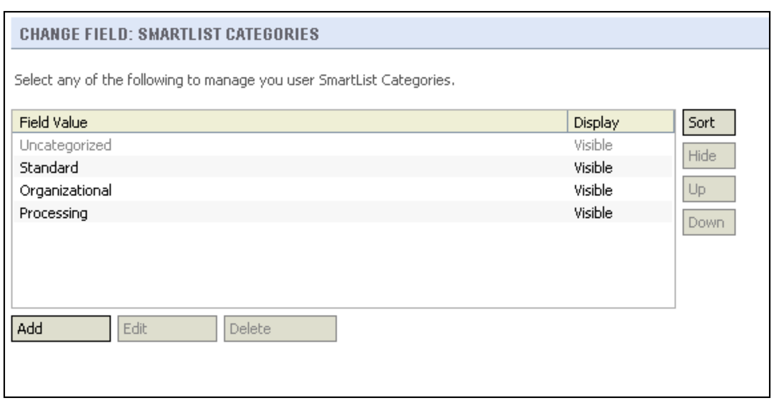
You can add more than one donor to notify by repeating that step or you can remove a donor to notify by clicking the red X next to their name.



As you enter donations attributed to an honorarium or memorial, GiftWorks automatically keeps a list of notifications that need to be sent, in addition to the acknowledgements to the donors who gave the donations.

Manage SmartList Categories

GiftWorks includes a number of SmartLists by default. As you create new SmartLists, you can place them in categories so they are easier to maintain and locate.

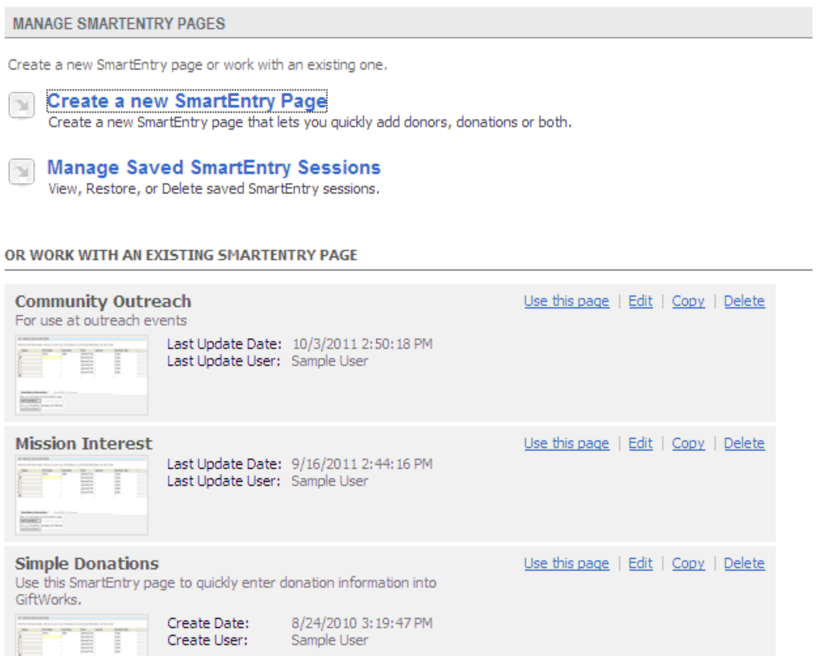


Manage SmartEntry Pages

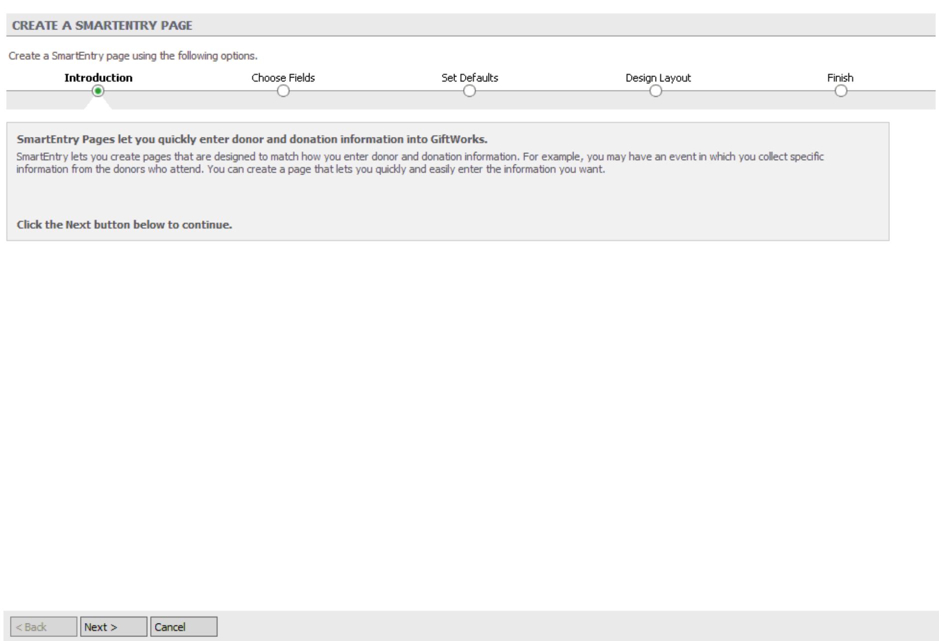
SmartEntry lets you create pages that are designed to match how you enter donor and donation information. For example, you may have an event in which you collect specific information from the donors who attend. You can create a page that lets you quickly and easily enter the information you want.

You also have the ability to save SmartEntry items entered and finish later.

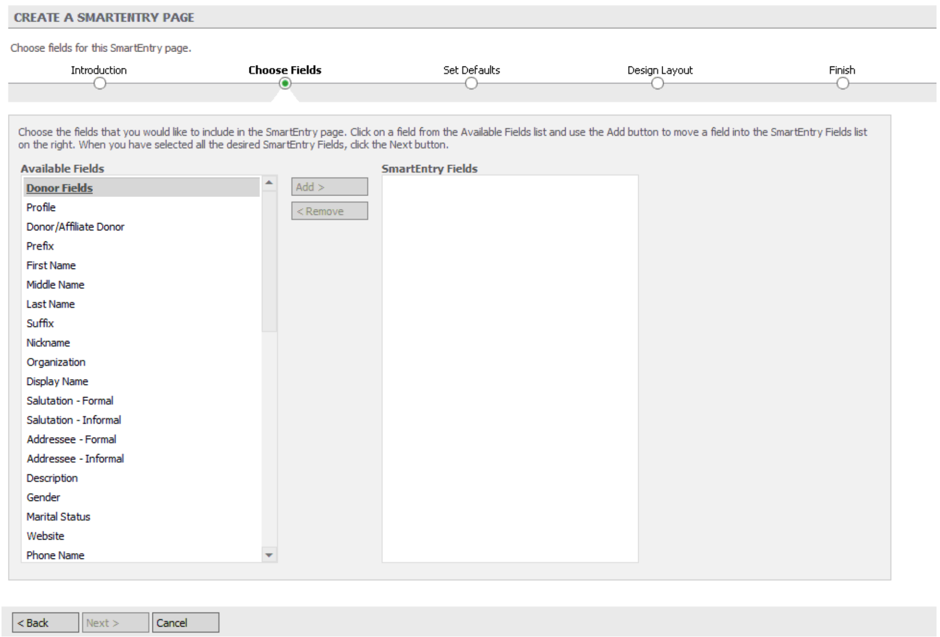
You can use the Saved SmartEntry as a “Template” for weekly/monthly giving etc.



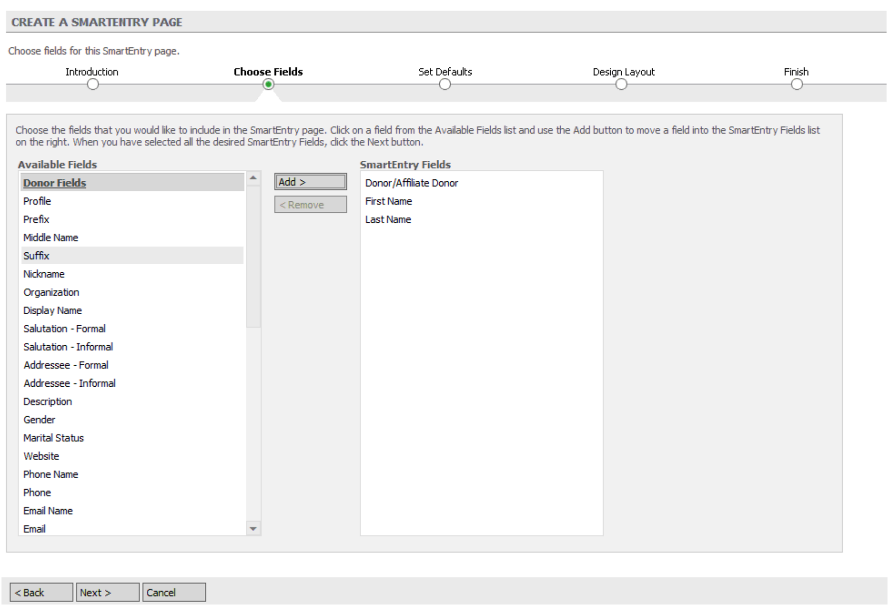
Click on Create a new SmartEntry Page



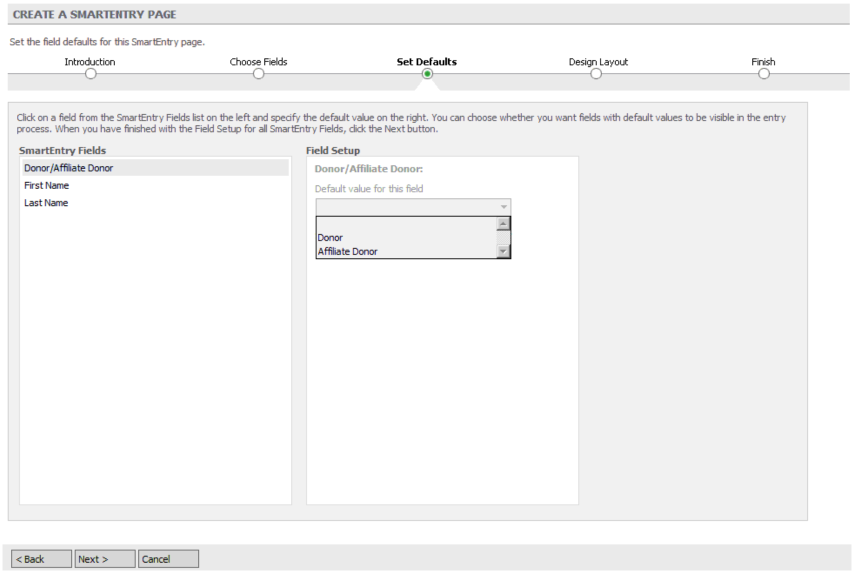
Click next and chose the fields.

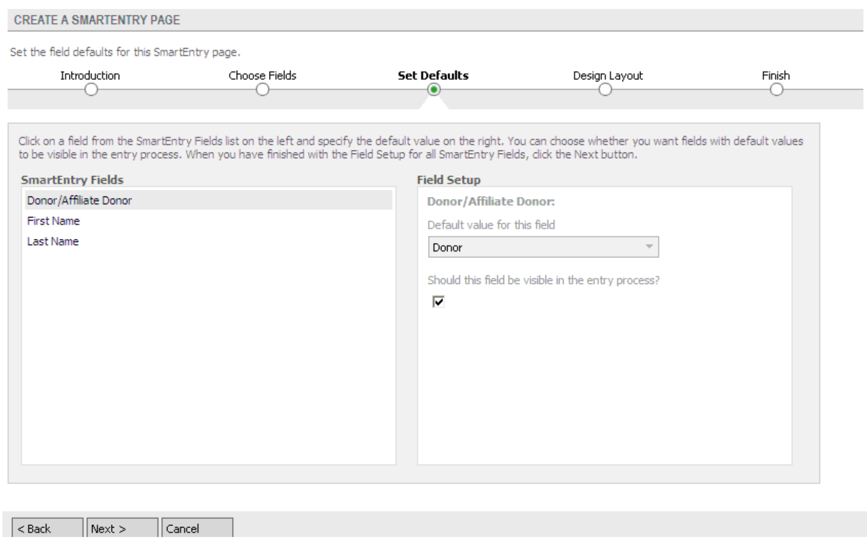


Click on the field on left side of screen then click Add button

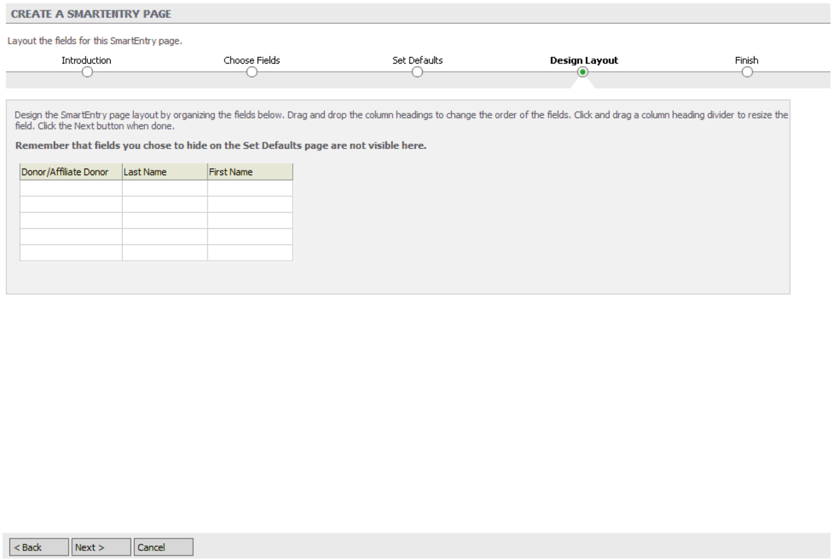


Choose field defaults where desired

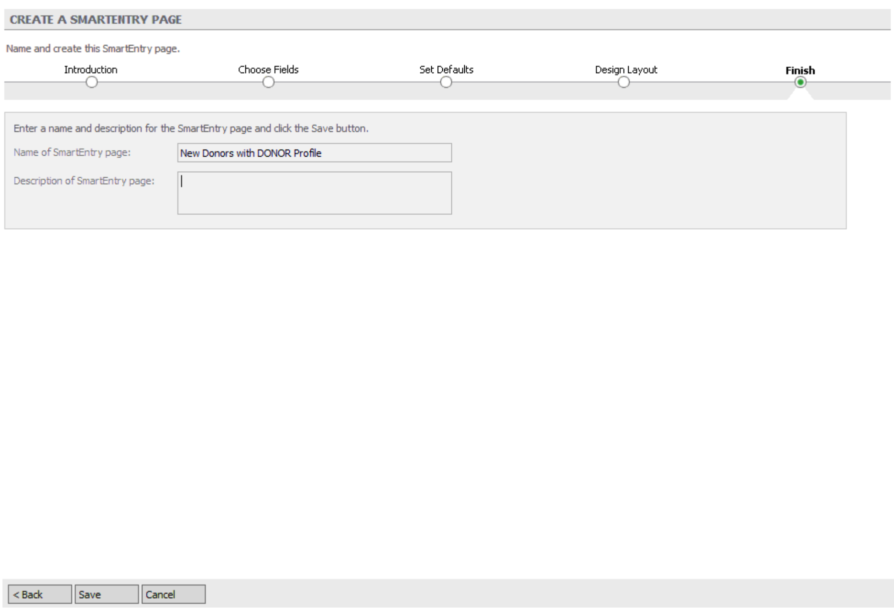

CREATE A SMARTENTRY PAGE
Set the field defaults for this SmartEntry page.
Introduction
Choose Fields
Set Defaults
Design Layout
Finish
Click on a field from the SmartEntry Fields list on the left and specify the default value on the right. You can choose whether you want fields with default values to be visible in the entry process. When you have finished with the Field Setup for all SmartEntry Fields, click the Next button.
SmartEntry Fields
Donor/Affiliate Donor
First Name
Last Name
Field Setup
Donor/Affiliate Donor:
Default value for this field
Donor
Affiliate Donor
< Back
Next >
Cancel


CREATE A SMARTENTRY PAGE
Set the field defaults for this SmartEntry page.
Introduction
Choose Fields
Set Defaults
Design Layout
Finish
Click on a field from the SmartEntry Fields list on the left and specify the default value on the right. You can choose whether you want fields with default values to be visible in the entry process. When you have finished with the Field Setup for all SmartEntry Fields, click the Next button.
SmartEntry Fields
Donor/Affiliate Donor
First Name
Last Name
Field Setup
Donor/Affiliate Donor:
Default value for this field
Donor
Should this field be visible in the entry process?
< Back
Next >
Cancel

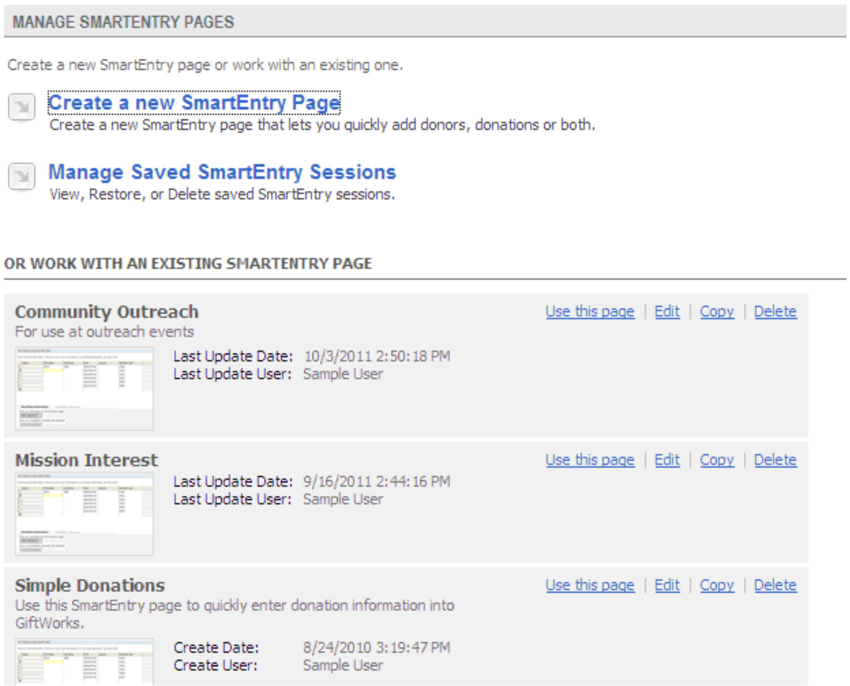
Change the order of how the fields will be displayed when using the SmartEntry Page

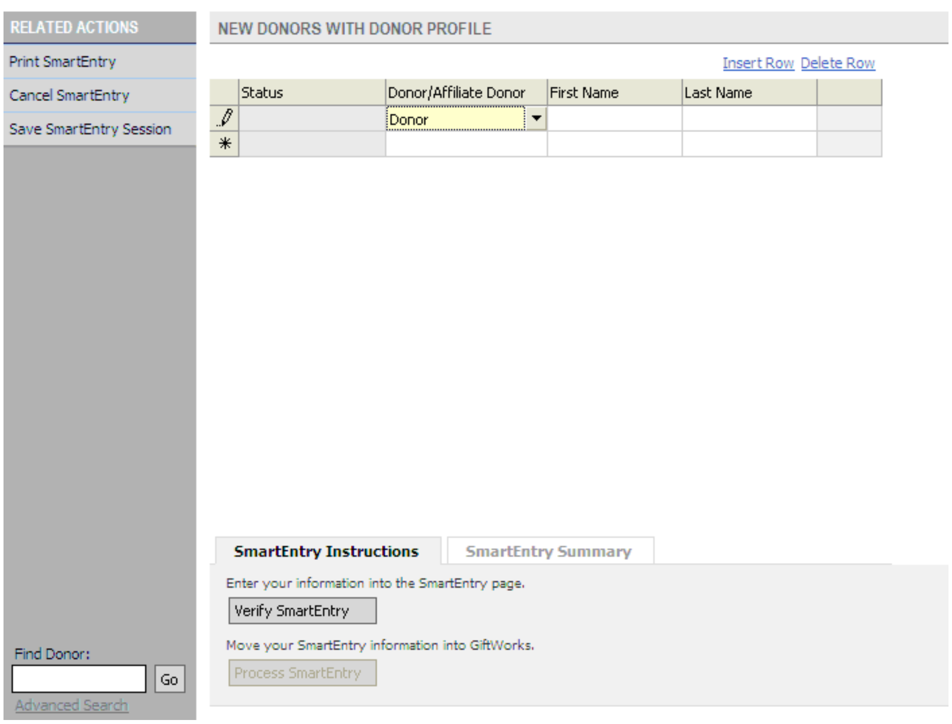


Save the new Page

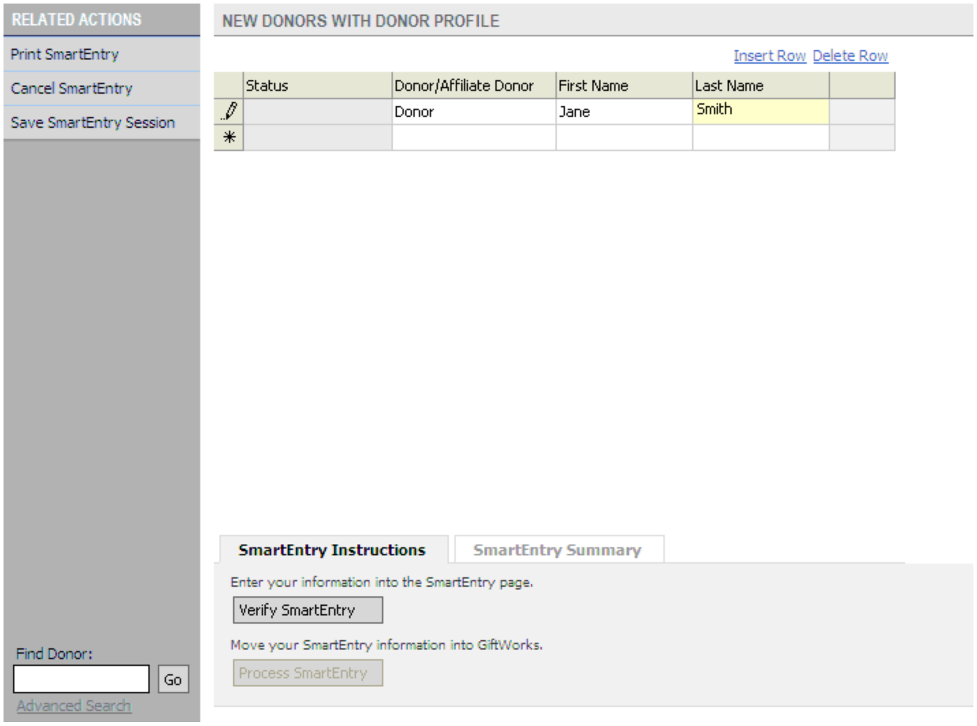


To use the SmartEntry Pages
Click on the Use this Page link

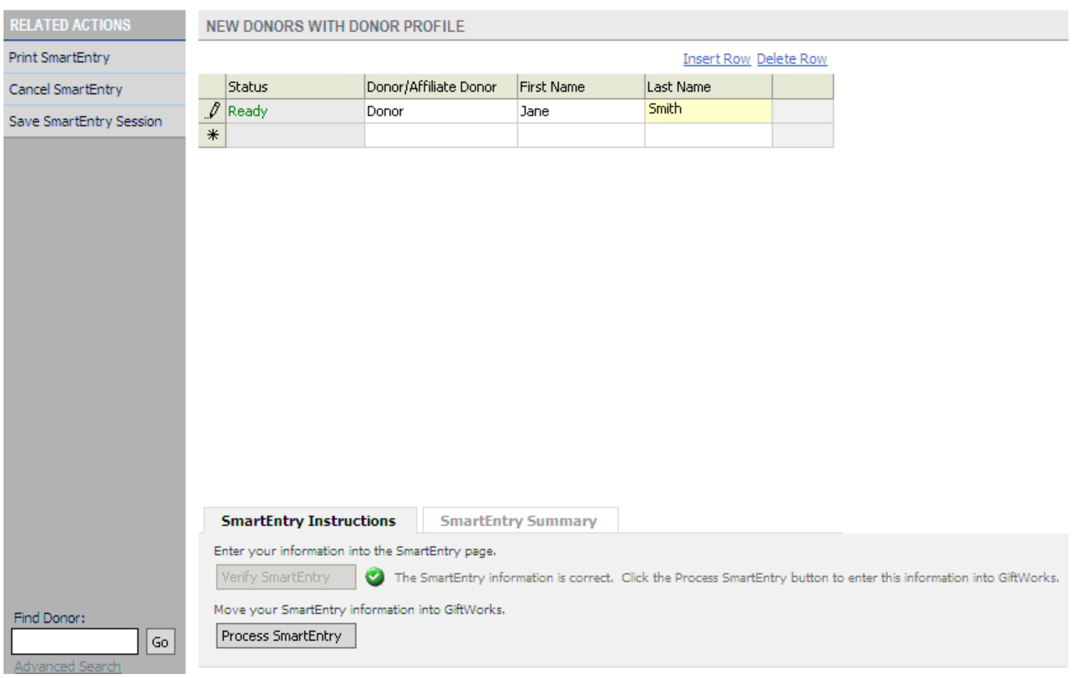




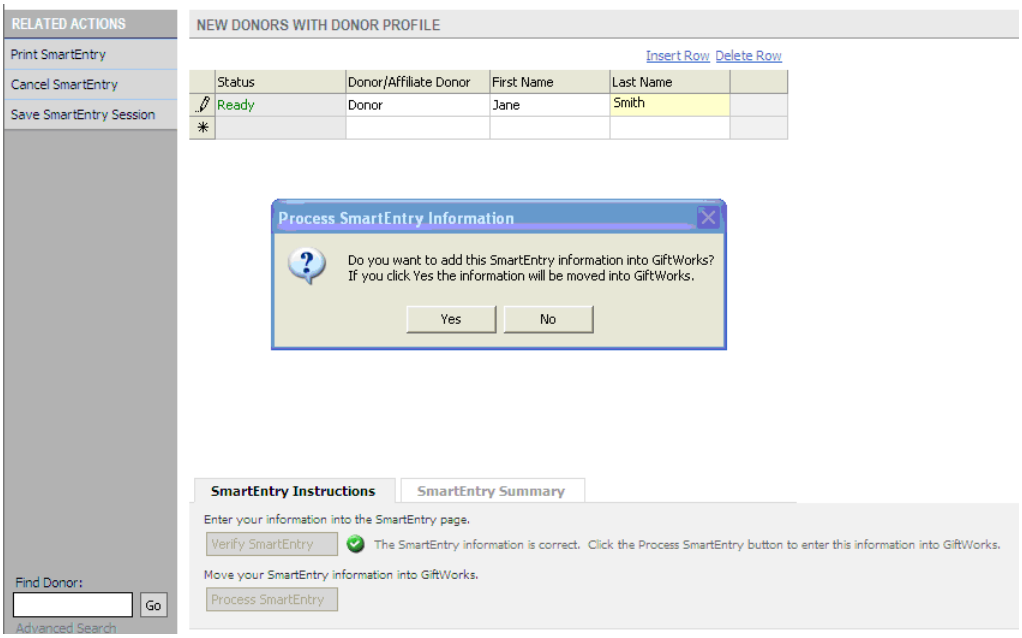
Enter in the data



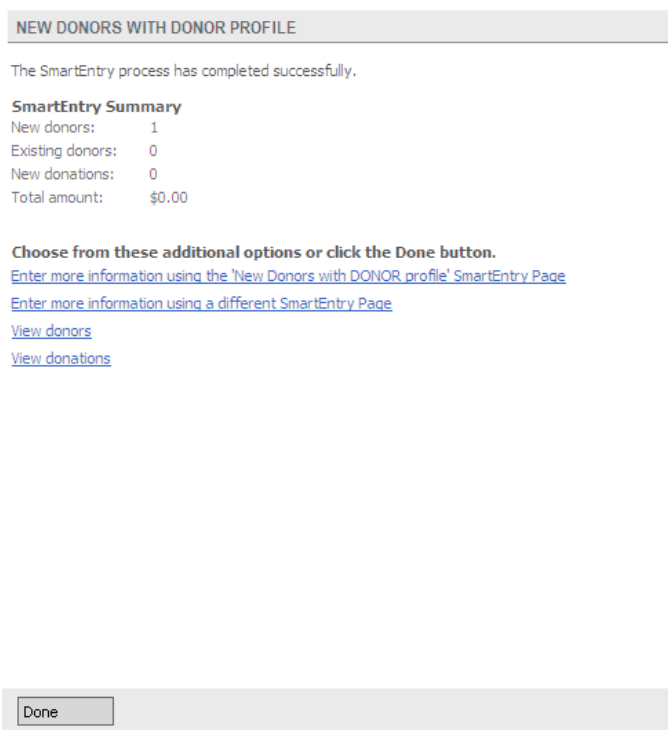
Click on Verify SmartEntry:



Click on Process SmartEntry:

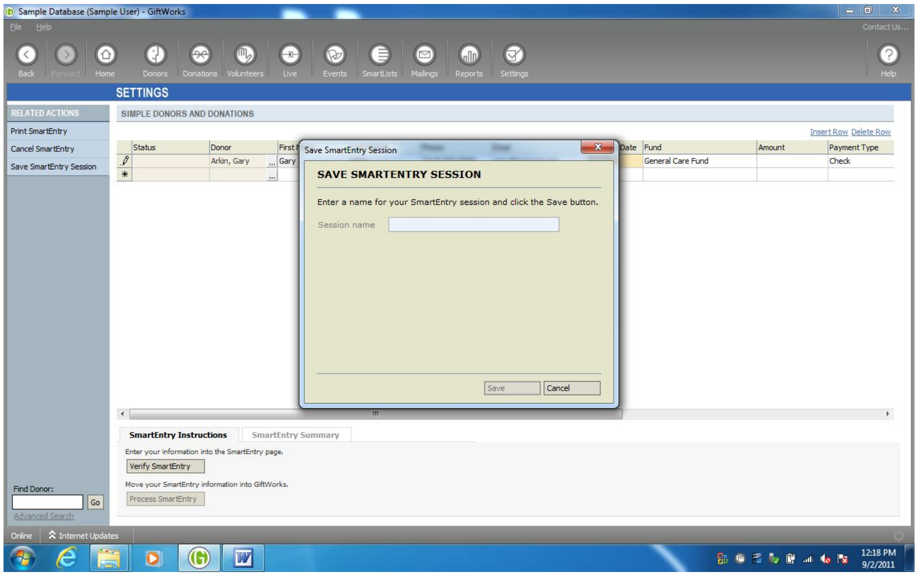

RELATED ACTIONS
Print SmartEntry
Cancel SmartEntry
Save SmartEntry Session
Find Donor:
Go
Advanced Search
NEW DONORS WITH DONOR PROFILE
Insert Row Delete Row
Status
Donor/Affiliate Donor
First Name
Last Name
Ready
Donor
Jane
Smith
Process SmartEntry Information
Do you want to add this SmartEntry information into GiftWorks?
If you click Yes the information will be moved into GiftWorks.
Yes
No
SmartEntry Instructions
SmartEntry Summary
Enter your information into the SmartEntry page.
Verify SmartEntry
The SmartEntry information is correct. Click the Process SmartEntry button to enter this information into GiftWorks.
Move your SmartEntry information into GiftWorks.
Process SmartEntry

Click Yes:

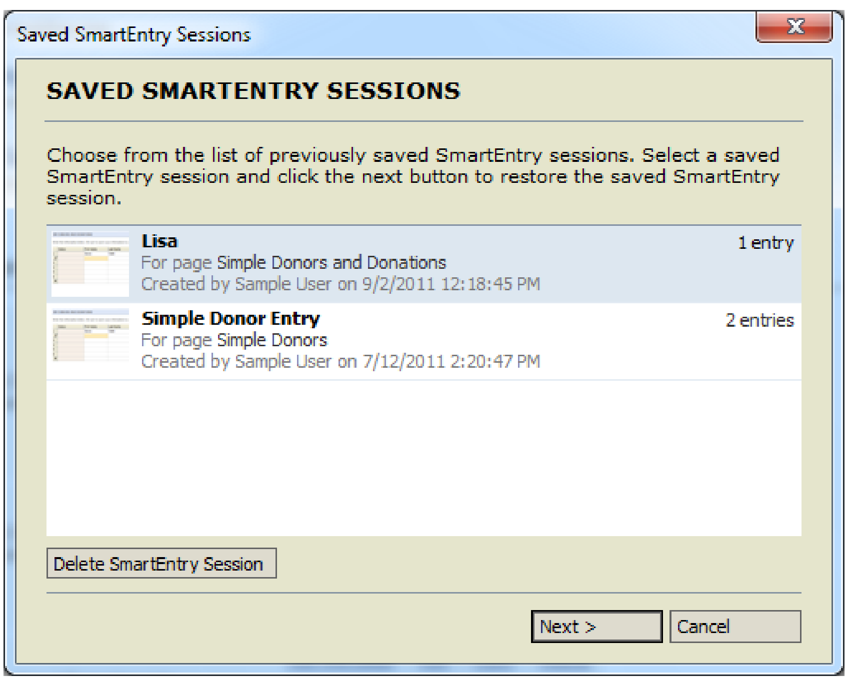

NEW DONORS WITH DONOR PROFILE
The SmartEntry process has completed successfully.
SmartEntry Summary
New donors: 1
Existing donors: 0
New donations: 0
Total amount: $0.00
Choose from these additional options or click the Done button.
Enter more information using the 'New Donors with DONOR profile' SmartEntry Page
Enter more information using a different SmartEntry Page
View donors
View donations
Done

Click Done

Save SmartEntry session – click Save SmartEntry Session on left.

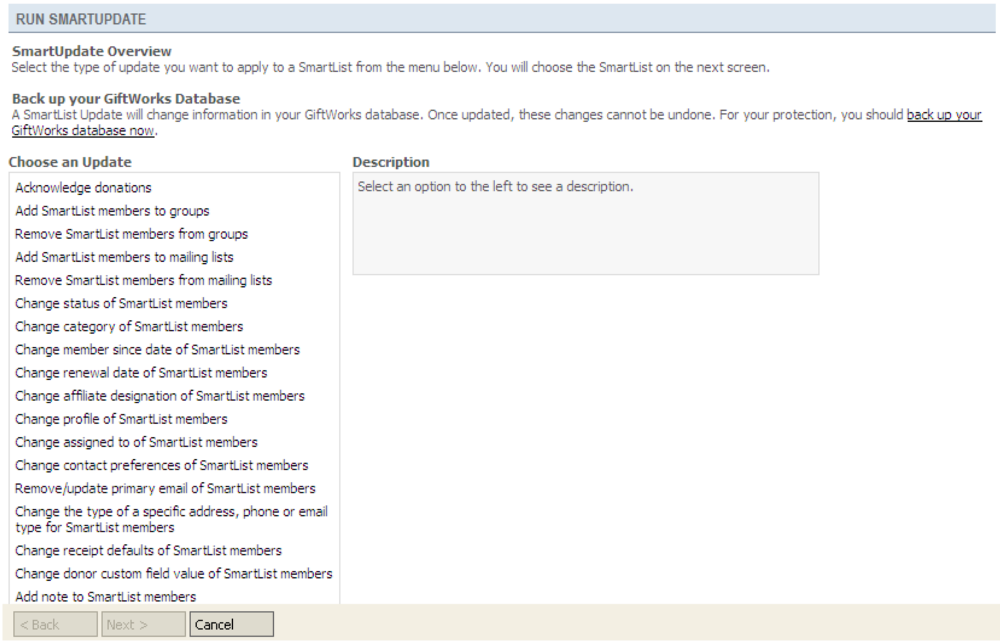


To process a SAVED SmartEntry session, go to Settings / Additional Settings & Tools / Manage SmartEntry Pages / Manage Saved SmartEntry Sessions



Choose the session then click Next.

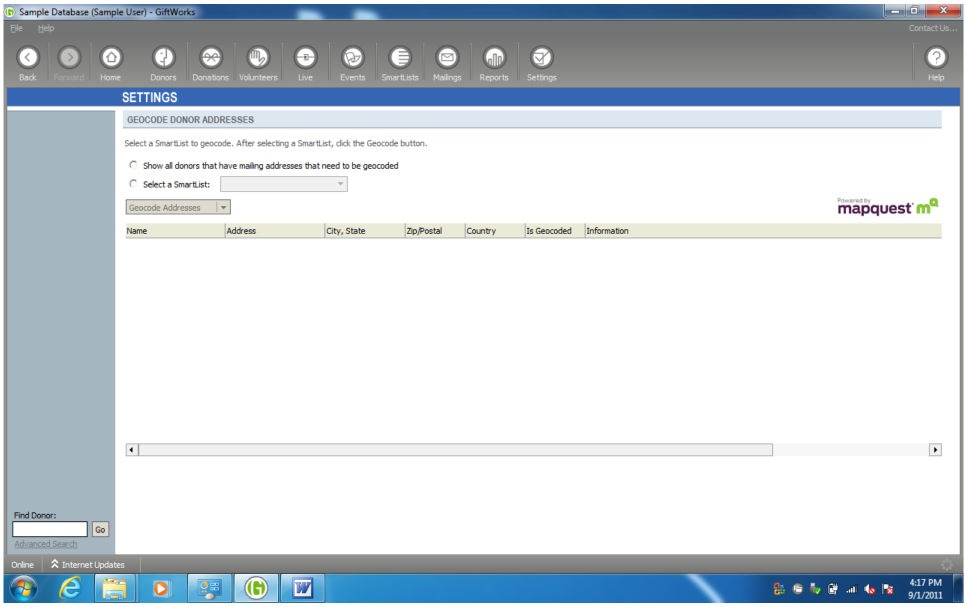
Run a SmartUpdate (Batch Updates)
A batch update is when you update all of the records in a SmartList. GiftWorks gives you a variety of options for performing batch updates on your database.



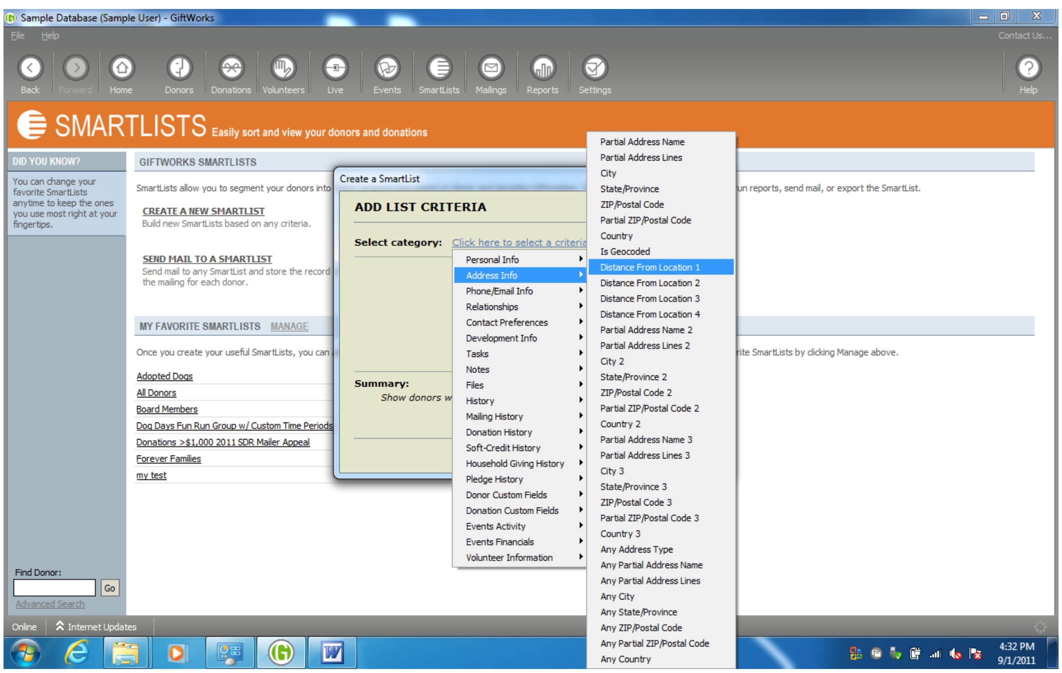
For each update, you can choose a SmartList that contains the records you want to update, and then choose how you want to update those records. If you have a large number of records that need to be changed in the same way, this can save you lots of time.

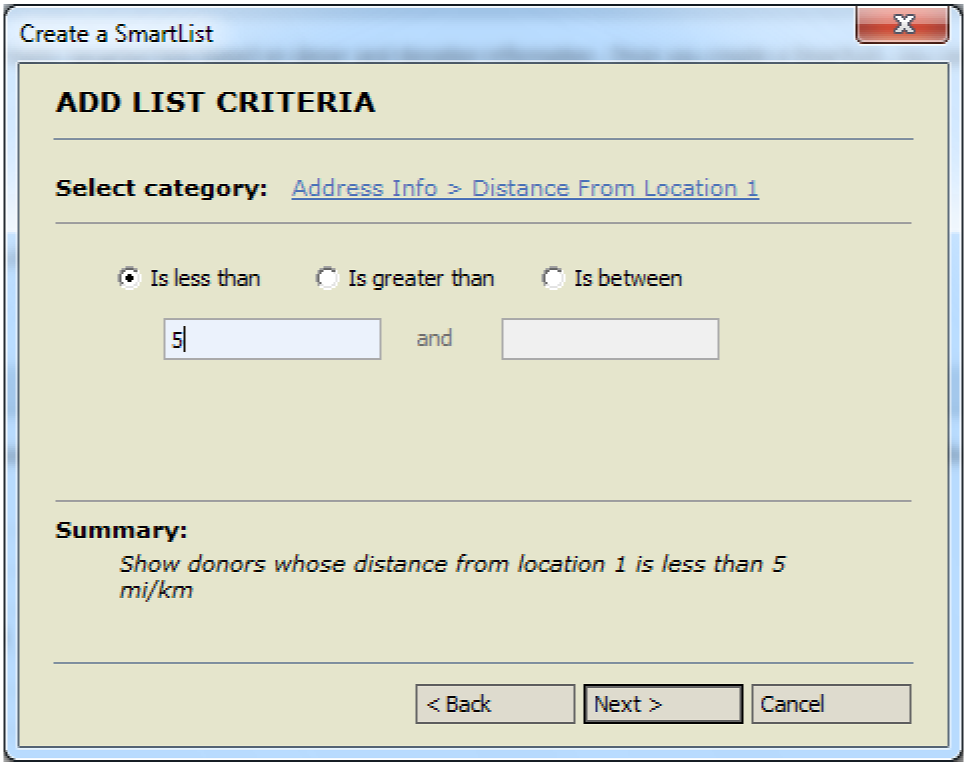
Geocoding
Geocoding is the process of determining the latitudinal and longitudinal coordinates for a specific address. GiftWorks has the ability to store geocoding data with an address. This will support the ability to create reports that plot addresses on a map, donor lookups based on distances from a map point, and more powerful mapping tools.

When doing this process from a SmartList or from within Settings, it will only Geocode the “Mailing” address
If you add/edit ANY TYPE of address, you can Geocode from there as well.

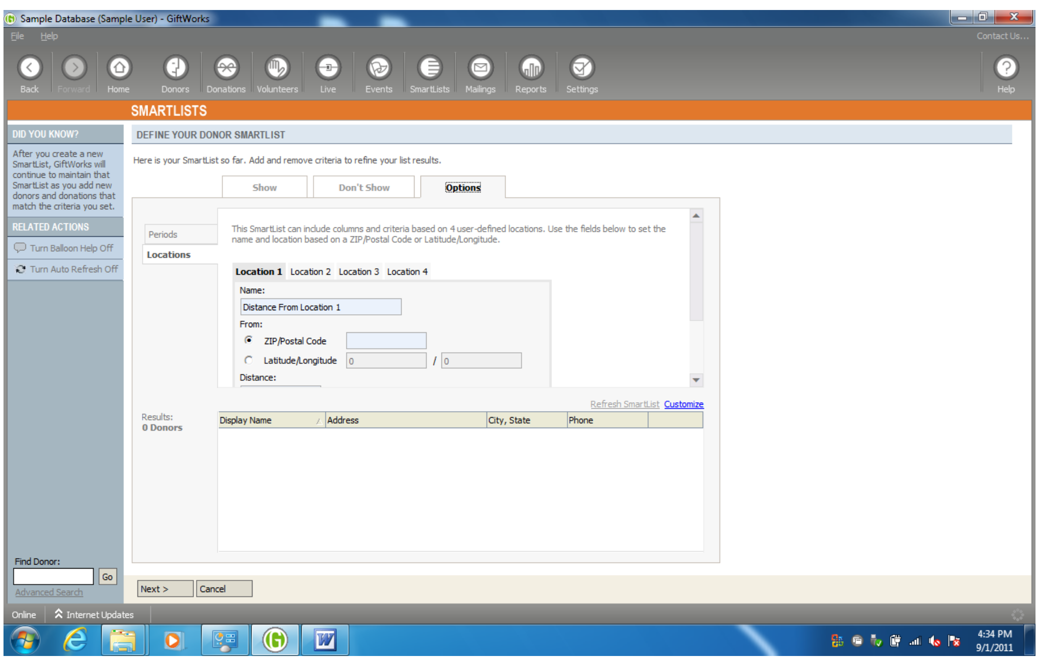


SmartList Criteria and Options for Geocoding:

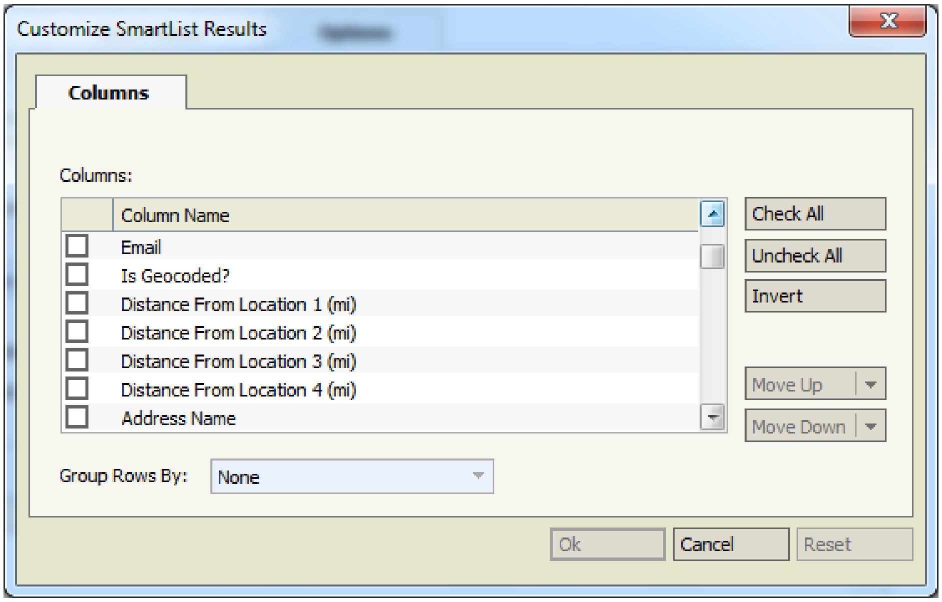




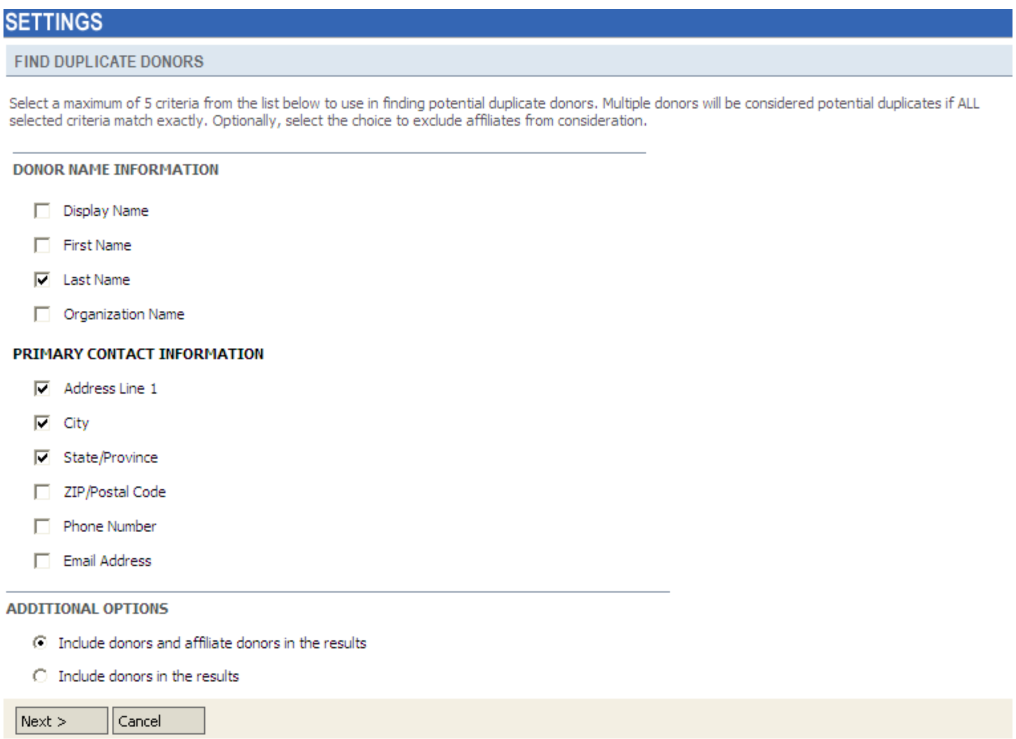
Set up “Locations” under Options tab:



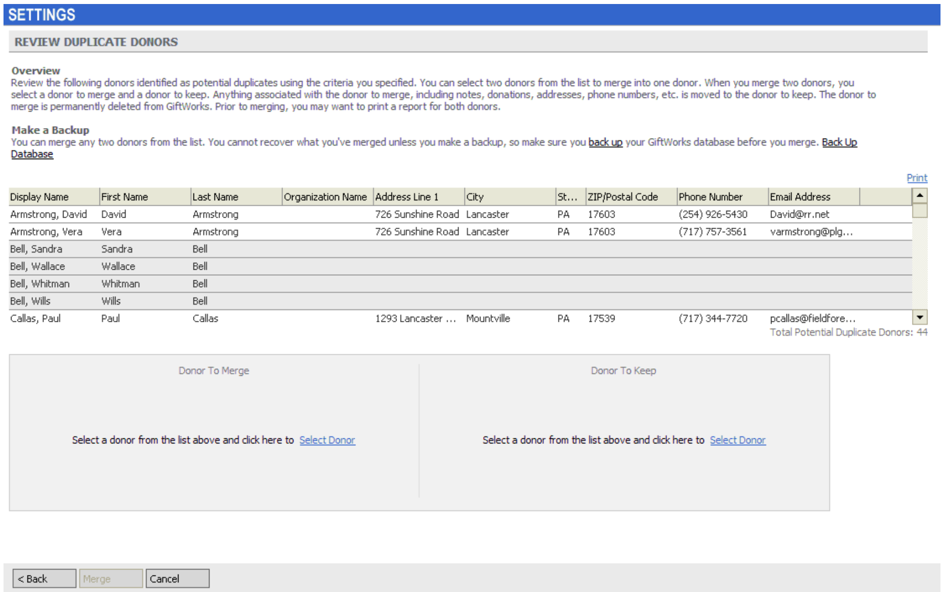
Customize options:



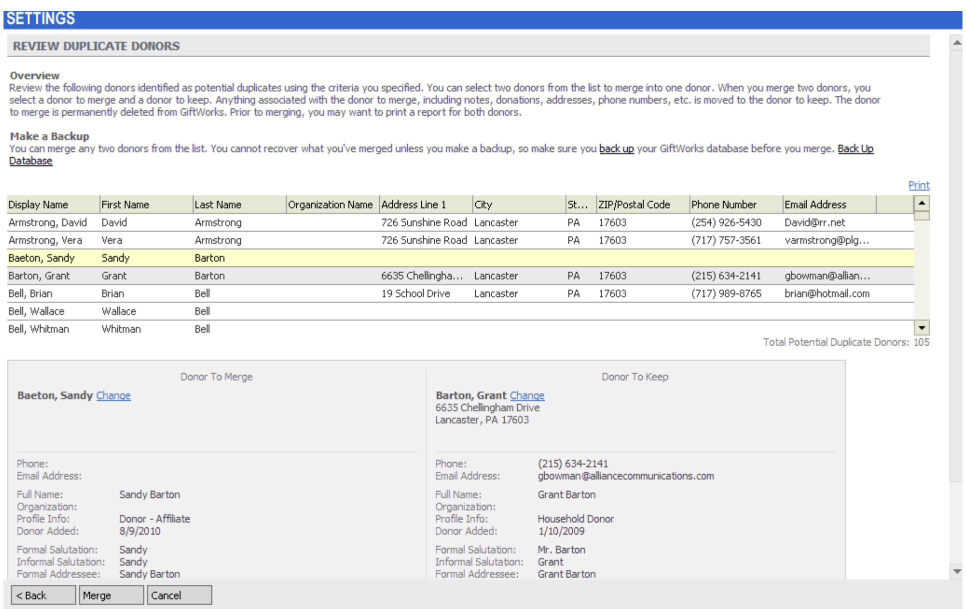
Find Duplicate Donors
This feature allows you to search for potential duplicate donors based on up to 5 criteria that you choose.



GiftWorks will then show you a list of the potential duplicates that were found.

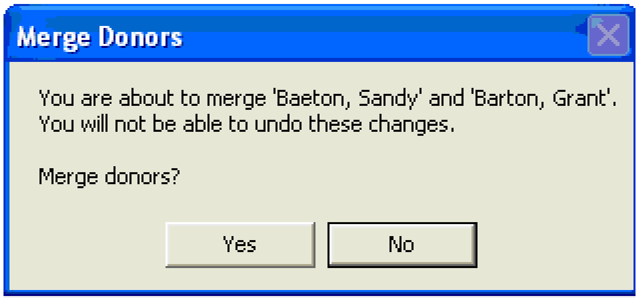


You can then merge the duplicate donors from here. Cilck on the row for the donor that you want to keep. Then click the 'Select Donor' link under the Donor to Keep area (on right). Now click on the row for the donor that you want to merge (discard). Then click the 'Select Donor' link under the Donor to Merge area (on left). You will see a summary for both donors.



Click Merge.

You will see a prompt to confirm the process



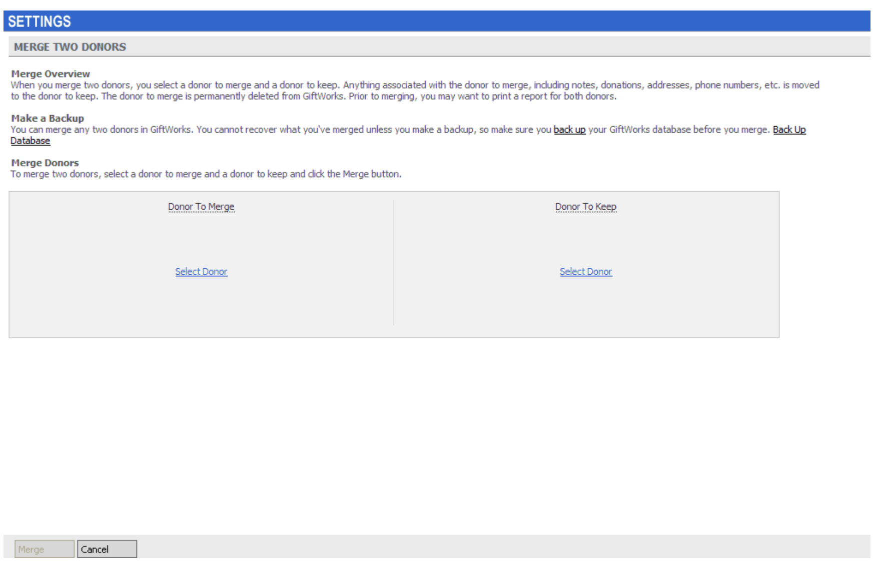
Click Yes

You will see a prompt confirming the process is finished. Click Ok.

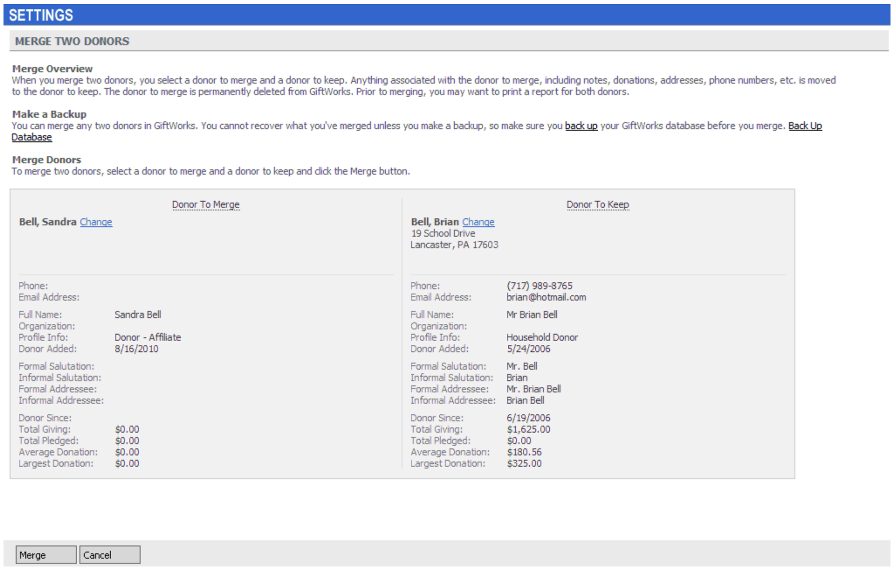
****NOTE: **Be sure to back up your database before merging donors as this step cannot be undone**.

Merge Donors

This feature allows you to merge two donors into a single donor. The information from one donor will be moved into another donor resulting in a single donor.

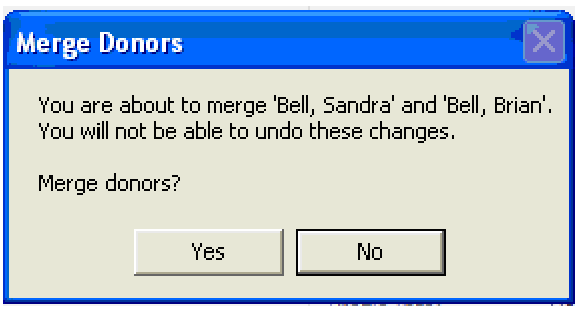


Click on the 'Select Donor' link under the Donor to Keep area (on right) and search for the donor. Then click the 'Select Donor' link under the Donor to Merge area (on left) and search for the donor you want to merge (discard). You will see a summary for both donors.



Click Merge

You will see a prompt to confirm the process



Click Yes

You will see a prompt confirming the process is finished. Click Ok.

******NOTE: Be sure to back up your database before merging donors as this step cannot be undone.**

GIFTWORKS GLOSSARY

Account
An accounting field that indicates which general ledger account donations and pledges should be debited or credited to. In GiftWorks, the account is accessed by applying the donation to a fund. If you use GiftWorks with QuickBooks accounting software, you can automatically configure GiftWorks to match up with your QuickBooks chart of accounts.

Acknowledged
This field indicates whether or not a donation was acknowledged, and if so, how it was acknowledged. You can either enter this information manually, or, when you enter a donation, you can schedule it to be acknowledged through a mailing. When the thank you letter mailing is processed, the donation is marked acknowledged with information about when the letter, and which letter, was sent. For a multi-payment pledge, there is an Acknowledged field for each payment, as well as for the overall pledge.

Acknowledgement
For any donation or pledge entered into GiftWorks, there is an acknowledged flag. As you enter the donation, you can choose to add the donation to a thank you letter mailing. Sending a thank you letter mailing lets you mark the donation as acknowledged automatically. You can also manually mark donations as acknowledged. This is helpful if you, for example, thank the donor with a handwritten note or phone call.

Addressee
Addressee fields are used to store information you would typically like to see on the first line of a mailing address. There are both formal and informal addressee fields, letting you address donors differently for different purposes. Based on the type of donor and the name information you enter, GiftWorks will attempt to fill in a default value for you.

Examples:

Donor: John Smith
Formal: Mr. John Q. Smith
Informal: John Smith

Donor: John and Mary Smith
Formal: Mr. and Mrs. John and Mary Smith
Informal: John and Mary Smith

Donor: Acme Corporation (with a primary contact)
Formal: Mr. John Smith
Acme Corporation
Informal: Acme Corporation
John Smith

Donor: Acme Corporation (without a primary contact)
Formal: Acme Corporation

Informal: Acme Corporation

Addresses
For each donor, you can enter multiple addresses. In GiftWorks Standard, donors must have a Mailing Address and can have multiple Informational Addresses. The Mailing Address will always be used for mailings sent from GiftWorks.
In GiftWorks Premium, donors must have a Primary Address and can have multiple Seasonal and Informational Addresses. Either the Primary Address or Seasonal Address will be used for mailings sent from GiftWorks based on the current date of the mailing.

Administrative Password
In the Settings section of GiftWorks, you can add an administrative password. The password is then required to access all administrative settings, including database restore and backup, editing the default values, and many others.

Affiliate Donor
When you want to track information about a donor, but don't necessarily want to include that donor in mailings or in your count of donors, you can add a person to GiftWorks as an affiliate donor.

An example might be a board member whose donations typically come from his or her household. The household would be the donor in your database, but you might add the board member as an affiliate related to that household. This allows you to track individual information about the board member, and contact him or her when you want, but would not add the board member to most of your mailings -- typically, mailings would go to the household.

Affiliate donors are not expected to make gifts or pledges. To add a gift or pledge from an affiliate, the affiliate donor must be converted to a donor.

Amount
For a gift, the amount is the actual amount of the single payment that makes up that gift.

For a pledge, the amount is the sum of all scheduled payments (or the total amount pledged). For pledges, there is also the received amount, which is the total of all received payments to date towards that pledge.

For pledge payments, there is an actual amount (the actual amount received toward that payment), and an expected amount (the amount you are scheduled to receive). Ideally, these are the same number.

Anonymous
If a donor chooses, any donation can be listed as anonymous by using an available donation field. This field serves only as a reminder to the user that a donation has been designated anonymous. It does not affect the donation in any other way, including how it is used in reports and SmartLists.

Appeal
Each mailing or other contact (a phone call or newsletter, for example) that might generate donations is considered an appeal. If a campaign consists of multiple appeals, then analyzing which appeals resulted in the most donations can show you which are most effective.

PREMIUM

CASS-certified Addresses

Your address list must be validated and corrected by a CASS-certified process for a mailing to qualify for Standard Mail Automation letters rates. This can be done through a vendor that provides these services, or with USPS approved software. Refer to the USPS guidelines for the frequency of certification.

Campaign

A campaign is a series of events and solicitations (for example, mailings, phone calls, and special events) that make up a cohesive push for funds for a specific purpose. In GiftWorks, a campaign is made up of several appeals. An example of a campaign might be “Fall Membership Drive 2004” or “Annual Spring Cleaning Festival 2003.”

Comma-Separated Value (.csv) File

A comma-separated value, or .csv, file is a data format where each line contains a row of data, separated or delimited into columns by commas. The fields can also be delimited by quotation marks, which is necessary if any of the fields contain a column.

GiftWorks can import data from .csv files, which is a common format for export from other programs. GiftWorks also exports data into .csv format.

Custom Fields

GiftWorks includes a wide variety of fields for donors and donations, but occasionally your organization may need to store information for which there is no standard field. For these cases, GiftWorks lets you create custom fields for both donors and donations. There are different types of custom fields, including lists of fixed values and textboxes where you can enter text or numbers, date fields, and checkboxes.

Custom Periods (SmartLists)

For each donor SmartList, you can define up to four custom periods. Each custom period is defined by either a relative date range (such as the “last 30 days”) or a specifically defined range (“Jan 15 to March 30, 2007”).

You can also provide a name for each custom period, and you can show a number of statistics in your SmartList results, including total donations, average donation, largest donation, and number of donations per donor for that period. This lets you easily research and report on historical giving by your donors.

Date

For a gift, the gift date is the actual date the gift is received. In some cases, this may be the actual date the gift is processed (which may be later than the date it was actually received). This date can be set when the gift is entered into GiftWorks.

For a pledge, the pledge date is the actual date the pledge is received (the date of the promise).

For a payment, there are two dates. The actual date is the date the payment is actually received. The expected date is the date the payment is (or was) scheduled to be received.

Delivery Point

The USPS assigns every address a two digit code that is used for USPS discounted mailings. The Delivery Point for each address is returned by the CASS-certified ZIP+4 or delivery point code address matching process and can be imported in to GiftWorks or can be manually entered.

Directed (or Restricted)
When donors give a donation, they can indicate that the donation should be directed (or restricted) to a specific purpose. The organization then has a legal obligation to use the donation only for that purpose. There is a field available to indicate such a direction (or restriction). Direction (or restriction) can be set per gift or per pledge.

Display Name
This is the primary field that GiftWorks uses for each donor entered into the system. Based on the information entered for the donor's name, GiftWorks suggests a few display name options. The display name is used in reports, SmartLists, and for finding and displaying donors.

> **Examples:**
> For a household, it might be "Smith, Mr. and Mrs. John."
> For an individual, "Smith, John Q."
> For an organization, "Acme Corporation (Jack Sprat)."

Donation
In GiftWorks, a donation is a gift or a pledge payment. Although pledges are included in the Donations section of GiftWorks, they are not technically considered donations. Donation SmartLists, for example, include gifts and pledge payments, but not pledges.

Donor
Every person, household, or organization entered in GiftWorks is considered a donor. You might be more familiar or comfortable with the term contact or constituent, but in GiftWorks, they are referred to as donors. (See also affiliate donors.)

Donor Category
A field used to indicate the donor type with more precision than profile. The default categories are Individual/Household, Corporation, Foundation, Government Agency, and Religious Institution. The list of donor categories is customizable, so you can add, change, or remove items in the list, either from the category list on the Edit Donor screen, or from the Settings section.

Donor Group
Donor groups give you flexibility and power for classifying your donors. The list of groups is customizable, and you can add each donor to any number of groups. Examples of groups you might use include Board Members, Golf Tournament Participants 2008, Golf Tournament Sponsors 2008, or Member. You can create SmartLists based on group membership, and you can run reports, send mailings, and more.

Fiscal Year
GiftWorks lets you indicate the starting day and month of your organization's fiscal year. This feature gives you the ability to create SmartLists and reports based on your fiscal year and the calendar year.

Fund

An accounting field used to record which fund a donation is applied to for fund accounting purposes. Certain campaigns may have their own funds (capital campaigns, for example). Directing (or restricting) a donation can have an effect on which fund it goes into.

Each fund is linked to multiple debit and credit accounts (see account). If you use GiftWorks with QuickBooks accounting software, you can automatically configure GiftWorks to match up with your QuickBooks chart of accounts.

Gift
A gift is a one-time transaction, where the payment is received on the same day as the gift. (See also pledge and pledge payment.)

GiftWorks Backup File (.gbf)
When you create a backup of your GiftWorks data file, it will be saved with a .gbf extension. When you want to restore a backup, you will need to locate the .gbf file to start the restore process.

GiftWorks Data Source (.gds) File
All of your GiftWorks data is stored in a GiftWorks Data Source, or .gds, file. When you first create your database, you can choose a name and location for the file. If you ever move the file, you will need to redirect GiftWorks to the new location.

GiftWorks Import Configuration (.gic) File
When you import data into GiftWorks, you have the option to save the import configuration to a file. This file is called a GiftWorks Import Configuration, or .gic, file. Saving the configuration can save you time if you need to perform an import multiple times. You can restore almost all import settings by loading the .gic file at the beginning of the import process.

Honorarium/Memorial
An honorarium is a gift or pledge received in honor of someone (or something). A memorial is a gift or pledge received in memory of someone (or something). In GiftWorks, you can set up honoraria or memorials so donations can be applied to them.

In addition to a name (for example, "In Memory of Michael Duvall"), you can enter a description and select donors from your database that should be notified of donations to the honorarium or memorial. This lets you acknowledge the donations to the donors who sent them, and also send honorarium or memorial notifications.

Informational Address
Informational Addresses are any addresses for a donor that you want to record as donor information, but that are not used as a current mailing address for the donor.

Mailing Address
One address for a donor must be designated as the donor mailing address and will be used as the current mailing address for mailings sent from GiftWorks. It will also be used in SmartLists and Reports.

Mailing List
A list of donors for a particular mailing. A mailing list differs from a SmartList in that you can explicitly put donors into a mailing list, whereas they are only included in a SmartList if they meet the criteria set

up for that SmartList. Once the mailing has been sent, you can choose (as part of the mailing process) to remove the donors from the mailing list or not.

> **Examples:**
> **“Welcome Letter” mailing list:** You can add donors to this list when they are first entered into GiftWorks. Once the Welcome Letter is sent, you can set GiftWorks to automatically remove them from the list.
>
> **“Newsletter” mailing list:** You can add donors to (or remove them from) this list to manage their subscription to your newsletter. For example, you may want volunteers or clients to receive your newsletter, but not necessarily your other donor communications.

Matched Gift
When a donation is received and that donation is being matched by the donor’s employer (or another donor), you can indicate this during the Add a Donation process, or you can add it to an existing donation. This gift is then marked as matched, and a corresponding matching pledge is created for the donor matching the gift.

Matching Pledge
Created when a matched gift is entered. The donor (typically a donor’s employer) that will be matching the gift will have a pledge added to their record in the amount of the match and with an estimated date of receipt. This allows you to track matching gifts and follow up on them if they do not come in.

Memorial (see Honorarium)

Name Tool
The name tool is part of the GiftWorks importer. It takes a name and splits it into the separate fields that compose it.

> **Example:**
> John D. Smith, Jr.
> **First Name:** John
> **Middle:** D.
> **Last Name:** Smith
> **Suffix:** Jr.

To access the name tool, go to the fourth step of the importer, the “Assign fields from your import file” or mapping screen. Choose Special options when mapping to a GiftWorks field, then choose Name Tool.

Online/Offline
GiftWorks detects if it is online or offline by checking its ability to connect to the internet. If your computer is connected to the internet, GiftWorks indicates it is online in the bottom left corner. If it indicates it is offline, it may be blocked by a firewall or other security software. Consult your security software documentation to determine how to grant internet access to GiftWorks.

GiftWorks must be online to receive free online updates, to send error information to Mission Research, to access the map feature available for donor addresses, and for some other functions.

Payment Types
GiftWorks includes several default payment types: check, credit card, cash, monthly bank draft, online payment, services, goods, and equipment. For each payment type, additional fields are available to record information about the payment. For example, the check payment type includes check number and check date fields.

You can also include custom payment types. If your organization receives payments that do not fit into one of the default types, you can create a new type and select the additional fields you want to record for payments of that type.

Phone Settings
To support both US and international phone number formats, GiftWorks lets you choose a default format. You can also override that format for any individual phone number you choose.

In the Settings section, under Customize and Change Default Values for GiftWorks Fields, there is an option to either restrict phone numbers to the US format, or to allow phone numbers in any format. The option you choose will be applied to any new phone numbers entered.

You can either enter phone numbers that fit your default choice. Or by clicking on the down arrow to the right of any phone number, you can “Relax the masking,” allowing you to enter anything.

The masking applies only at entry time. If you return later to edit a phone number, the masking is not enforced and you can enter a phone number in any format.

Pledge
A pledge is a promise from a donor to make one or more payments in the future. If the pledge has many payments, they are normally received over some time period defined when the pledge is received.

When you enter a pledge, you initially enter the date the pledge was made, total amount that you expect to receive, and the number of payments that will make up the pledge. GiftWorks then helps you build a payment schedule for the pledge and enters both the pledge and all expected payments. See pledge payment.

Pledge Payment
A pledge payment is a gift received that is applied toward a pledge. When you enter a pledge, one or more pledge payments are created, including an expected date and expected amount. Until the payment is received, the received amount is $0. When the payment is received, it is applied toward the pledge.

PREMIUM
Primary Address
A Primary Address is a donor’s usual mailing address. If a donor has an active Seasonal Address, that Seasonal Address will be used as the current mailing address for mailings sent from GiftWorks during a designated period. When the Seasonal Address time period expires, the Primary Address will automatically be reset as the current mailing address for the donor.

Profile

A profile lets you define the donor type. Profiles are household, organization, and no profile. Typically, an individual donor has no profile. A couple or household has a household profile, and an organization has an organization profile.

You can use profiles in SmartLists to create a list of donors of a certain profile, and you can then report on donors by profile. Different profiles display with visual differences (color and icon primarily) so it is easy to identify a donor type.

Proxy Server Settings
If you have trouble getting GiftWorks online, it may be necessary to set it up to use a proxy server. This is only necessary if you also need a proxy server for your web browser.

To determine if this is the case, open your Internet Explorer browser and click Tools > Internet Options > then on the Connections tab > then on LAN settings. If the bottom half of that window has information regarding a proxy server (specifically address and port), make note of that information.

Enter your proxy server settings into GiftWorks by clicking Internet Updates in the bottom right corner, then click Customize Updates. Check the Use a proxy server box and enter the same proxy information that you retrieved from your Internet Explorer settings.

Relationship
You can link donors in GiftWorks using relationships. There are three different types of relationships in GiftWorks: relationship, household relationship, and work relationship.

Relationship is for any relationship between two donors. The donors may be friends, neighbors, cousins, or have any other non-household or non-work relationship.

Household relationships include relationships among household members, and relationships of the members to the household itself. Typically, all information for a household is entered in a single donor record with a household profile. To track individual information about household members (for example, if one is a volunteer and another is a board member), you can relate those individual donor records back to the household.

Work relationships are typically used for employer/employee relationships. If you have a record for an organization, and also have employees of that organization who are donors, you can create relationships between the two. Among other benefits, this lets you send a mailing to all donors who are employees of an organization.

Relationship Role
When you define a relationship among donors, each donor will have a role in that reciprocal relationship. The list of roles in GiftWorks is customizable, but includes by default: husband, wife, partner, father, mother, employer, employee, friend, and others.

Each role is defined as applicable to a certain type of relationship: relationship, household relationship, or work relationship.

Reset Content Updates

If your computer has a problem with one or more updates, it may be necessary to reset your content updates. Normally, you should do this in consultation with GiftWorks Support.

To reset your content updates, click Internet Updates at the bottom left of GiftWorks, then click Customize Updates. The Reset button is on the bottom half of the window.

Restricted (see Directed)

Salutation
Salutation fields are used to store information you would typically see after the “Dear” in a letter. There are formal and informal salutation fields, so you can greet donors differently for different purposes. Based on the type of donor and name information you enter, GiftWorks attempts to fill in a default value.

Examples:
Donor: John Smith
Formal: Mr. Smith
Informal: John

Donor: John and Mary Smith
Formal: Mr. and Mrs. Smith
Informal: John and Mary

Donor: Acme Corporation (with a primary contact)
Formal: Mr. Smith
Informal: John

Donor: Acme Corporation (without a primary contact)
Formal: Friends
Informal: Friends

Sample Database
GiftWorks includes a sample database filled with donors, donations, and other information. This sample database lets you preview and work with GiftWorks before you import or input your own information.

To use the sample database, sign out of GiftWorks. Then, on the sign-in screen, click Change next to the name of your database. Then choose Use the sample database.

When you are ready to start working with your own data, be sure to create a new empty database by following the same process, but by clicking Create a new database.

PREMIUM
Seasonal Address
A Seasonal Address is a recurring address for a donor who resides at that address for a specified, active time period every year. All mailings sent from GiftWorks will be sent to the seasonal addresses during the specified active time periods. When the time period expires, the current mailing address for each donor will automatically change back to the Primary Address.

If a donor has more than one Seasonal Address or uses the Seasonal Address for mailing purposes at different times throughout the year, you will need to add each of the Seasonal Addresses and corresponding time periods for the donor.

A donor's Seasonal Addresses active time periods cannot overlap. The Primary Address will be used as the current mailing address unless a Seasonal Address is active.

The current mailing address is indicated in the Addresses field when a donor has multiple addresses.

Sectional Center Facility (SCF)
The GiftWorks Mailing Center can assist you in preparing USPS discounted mailings with lower postage rates for qualified mailings. To qualify for the lowest postage rates, USPS discounted mailings must be sent from a Sectional Center Facility (SCF).

A SCF is a postal facility that serves as the processing and distribution center for post offices in a designated geographic area as defined by the first three digits of the ZIP Codes of those offices. Some SCFs serve more than one 3–digit ZIP Code range. Check with your local post office to verify that it is an SCF.

Security
GiftWorks lets you protect the Settings section with a password, limiting access to most administrative settings and functions. Click the Settings icon at the top of GiftWorks, click Security, then click Set or Change Administrative Password.

> **PREMIUM**
> You can protect your database in Basic, Standard or Advanced Security. Each setting offers different levels of control over user access.

SmartList
To create a SmartList, you designate a set of criteria in the SmartList builder. Any donors or donations that meet those criteria automatically appear in the SmartList whenever you view it. SmartLists can be used to send mailings, create reports, and many other functions in GiftWorks.

There are three types of SmartLists: donors, donations, and pledges.

A donors SmartList results in a list of donors. Each donor will show up in the list only once, even if they meet multiple criteria.

A donations SmartList results in a list of donations (gifts and/or pledge payments). Multiple donations from the same donor can appear in the list. When sending a mailing, it is possible to consolidate so that each donor gets only one mailing.

A pledges SmartList results in a list of pledges. Multiple pledges from the same donor can appear in the list. When sending a mailing, it is possible to consolidate so that each donor gets only one mailing.

Software Key

When you purchase GiftWorks, you will receive a software key. You enter the software key into GiftWorks to convert it from a free trial to the purchased version. GiftWorks software keys look like MGWX-XXXX-XXXX-XXXX.

The keys are case-sensitive and must be entered exactly as they appear. If you need to know what your current software key is, click the Help menu at the top left of GiftWorks, then click About GiftWorks. Your software key will be listed to the right of the word “License.”

Solicitor
The Solicitor is a person (perhaps staff, board member, or volunteer) personally involved in asking a donor for a donation. Donations received in response to such a solicitation are entered with the person’s name in the solicitor field. Using reports and SmartLists, you can then keep track of the effectiveness of different solicitors.

Tasks
GiftWorks lets you enter tasks related to a donor or donors. You can use these tasks to keep track of things you need to do, such as phone, email, or meet with those donors.

In the Other Tasks menu on the left side of the Donor dashboard and many other screens, the task calendar can be viewed by clicking View Task Calendar. Each task is also recorded in the donor’s record so you can track past activities related to that donor. GiftWorks keeps notes and a history of mailings that were sent to that donor in the same location.

Transaction Register
GiftWorks stores ledger transactions for each gift, pledge payment, pledge, and the deletion of any of these. In the Settings section, under Accounting, you can view and filter the transaction register. The register is also the basis for the information that is posted to QuickBooks or to a file for import into another accounting application.

PREMIUM
USPS Standard Mail Automation Letters
A mailing can qualify for automation letter rates if it is machinable and the letters display the correct barcode. It must also meet weight, shape and size standards.

PREMIUM
USPS Standard Mail Machinable Letters
A letter is machinable if it can be sorted on Postal Service processing equipment, display an accurate address, and meets specific standards, including size, shape, and weight. Machinable letters are eligible for presort (discounted) rates.

Updates
Periodically, Mission Research releases GiftWorks updates. If you are online, GiftWorks checks for updates each time you start it.

To manually check for an update, click Internet Updates in the bottom left corner, then click Check for Updates. If an update is found, GiftWorks will download it and prompt you through how to install it. It may be necessary for you to sign out of GiftWorks to complete the update.

XML
XML stands for eXtensible Markup Language. It is a common format used to transfer or store data. GiftWorks can export data into this format, which may be useful depending what you plan to do with the data after export.

PREMIUM
ZIP Code Verified Addresses
For a mailing to qualify for presorted Standard Mail machinable rates, you must check the accuracy of ZIP Codes prior to mailing. When you fill out and sign your postage statement you are certifying your mailing qualifies for the rates claimed. Your post office can help you choose the best option for verifying your mailing list addresses.